

**THE
MACARONI
JOURNAL**

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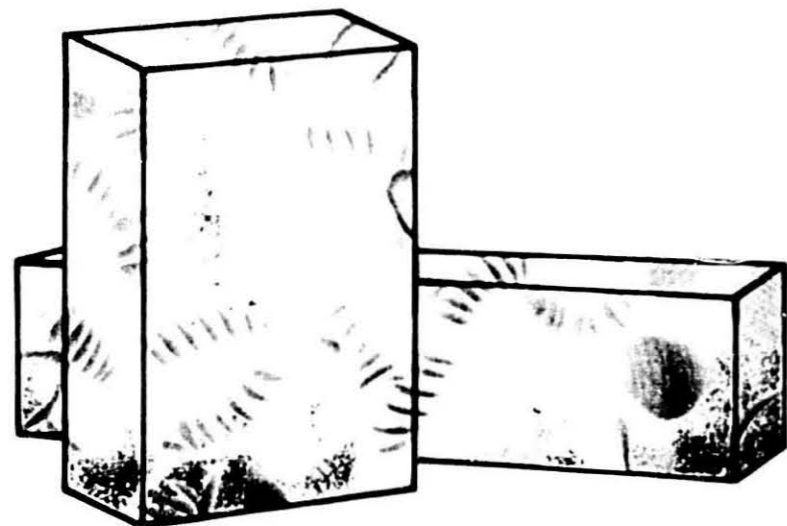
Macaroni Journal

(0024-8894)

NOVEMBER, 1983



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The

History

In This Issue

Structure

JOHN TERCZAK PRESENTS PASTA AMERICAN STYLE

John Terczak



Pasta American-Style

(Continued from page 3)

tree. Believing that pasta salads are a major contribution to our culinary heritage, he presented a salad assortment . . . spinach fettuccine and seafood, rotelle with vegetables, and shells mixed with fruits. As with the hors d'oeuvres, these specialties could be savored without calorie concern. Calories ranged from 315 to 400.

The menu was completed with California artichoke soup appetizer and a dessert of fruits, creme de menthe, Madiera wine and citrus juices.

Pasta Goes American Menu Hors d'oeuvres

Pasta Nibblers, U.S.A.

. . . cherry tomatoes filled with linguine in a basil dressing

Bow Tie Kabobs

. . . skewered pasta, Long Island scallops, peppers in lime marinade

Chicken Stuffed Shells

. . . shells filled with chicken and raisins flavored with honey, mustard and onion

California Artichoke Soup

. . . a blend of artichoke puree, chicken stock, tomato juice and seasonings with sliced avocado

Fettuccine Seafood Salad

. . . spinach fettuccine, Gulf shrimp, scallops, walnuts, dill in a sour cream dressing

Golden Gate Pasta-Vegetable Salad

. . . rotelle and fresh vegetables in a pungent lemon dressing, lemon/lime wedge garnish

Pasta-Fruit Salad

. . . raspberry-flavored mayonnaise lightly laces pasta shells, bananas, apples and raspberries

Fresh Fruit Compote a la Terczak

. . . chef's presentation of fresh fruits marinated in creme de menthe, Madiera wine and citrus juices topped with a dollop of yogurt

Coffee - Tea

WINE

Cedar Ridge Chardonnay, Sonoma County, California 1981



Intriguing hors d'oeuvres, made with a variety of pastas, are imaginative pre-meal nibbler fare.

Pasta Nibblers, U.S.A.

(Makes About 48 Hors d'oeuvres)

- 2 ounces linguine*
- 1 teaspoon salt
- 3 cups boiling water
- 48 cherry tomatoes (about 2 pints)
- 20 fresh basil leaves (about 1/2 cup)
- 1/2 bunch parsley, stems removed (about 1 1/2 cups)
- 4 cloves garlic, peeled
- 2 tablespoons pine nuts
- 2 tablespoons olive oil
- 1 1/2 tablespoons lemon juice
- 2 teaspoons grated Romano cheese
- Salt to taste
- Freshly ground black pepper to taste

Gradually add linguine and salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until just tender. Drain in colander. Rinse with cold water; drain again.

While linguine is cooking, cut in thin slice from top of each tomato; remove seeds and pulp. Dip tomatoes, a few at a time, into boiling water for about 5 seconds with slotted spoon. Drain well.

Combine remaining ingredients in food processor. Process until pureed. Place in measuring cup; remove 3 tablespoons and set aside.

Finely chop linguine. Add basil mixture in measuring cup. Fill tomatoes with linguine mixture. Garnish with reserved basil mixture.

* 1/2 cup (3 ounces) orzo may be substituted.
Calories per hors d'oeuvre: 20

Bow Tie Kabobs (Makes About 28 Hors d'oeuvres)

- 4 ounces large bow ties (about 2 cups)*
- 1 1/2 teaspoons salt
- 1 1/2 quarts boiling water
- 1 medium onion, peeled and diced
- 1/4 cup diced green pepper (about 28 pieces)
- 1/4 cup diced red pepper (about 28 pieces)
- 28 bay scallops, uncooked (1/4 cup - 2 ounces)
- Salt to taste
- Freshly ground pepper to taste
- 1 cup lime juice, divided

Gradually add bow ties and salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until just tender. Drain in colander. Rinse with cold water; drain again.

Arrange all ingredients in layers in two shallow dishes. Pour 1/2 cup lime juice over each dish. Cover and marinate in refrigerator overnight. To serve, drain off lime juice. Alternate ingredients on food picks, using 2 bow ties for each.

* Uncooked bow ties are about 1 1/2 inches in length.
Calories per hors d'oeuvre: 20

Chicken Stuffed Shells (Makes About 36 Hors d'oeuvres)

- 2 tablespoons raisins
- 2 ounces large macaroni shell (about 1 cup)*
- 1 teaspoon salt
- 3 cups boiling water
- 1 whole boneless, skinless chicken breast (about 6 ounces)
- 2 tablespoons grated onion
- 1 1/2 tablespoons butter or margarine
- 2 tablespoons Dijon-style mustard
- 2 tablespoons honey
- 2 tablespoons finely chopped walnuts, optional

Place raisins in small bowl. Cover with water and soak 2 hours; drain and set aside.

Gradually add shells and salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until just tender. Rinse with cold water; drain again.

Meanwhile, pound chicken to flatten. Sauté onion and chicken in butter or margarine over medium heat, covered, about 12 minutes or until chicken is tender. Turn occasionally.

Put chicken mixture, mustard and bone into food processor. Process until smooth. Fold in raisins. Fill shell with chicken mixture. Sprinkle with almonds, if desired.

* Uncooked shells are about 1 1/4 inches length.

Note Do Not Use Jumbo Shells.
Calories per hors d'oeuvre: 20

California Artichoke Soup (Makes 8 Servings)

- 4 medium artichokes, cooked
- 1 large onion
- 3 stalks celery
- 1 clove garlic
- 1 stick (8 ounces) sweet butter, divided
- 2 quarts chicken stock
- 1 1/2 cups tomato juice
- 1 medium avocado, peeled, pitted and thinly sliced
- White pepper to taste
- Salt to taste
- Ground nutmeg to taste

Separate leaves from artichoke bottoms and hearts and reserve for garnish. With the back of a spoon remove the thistle-like chokes and discard.

Process onion, celery and garlic in food processor until finely chopped. Melt 1/2 stick butter in large sauce pot. Add vegetables from processor and artichoke bottoms and hearts. Sauté about 5 minutes or until vegetables are tender, stirring frequently. Add chicken stock and tomato juice. Cover and pour in batches in covered blender. Return to sauce pot by pouring through a coarse sieve held over the pot. Wash through with a large spoon. Bring to a boil; boil 5 to 8 minutes or until soup coats the back of a metal spoon. Skim if necessary. Dice remaining butter into soup. Remove at and whisk gently until buttersolved. Add avocado. Season with salt and pepper. Garnish with reserved artichoke leaves.
Calories per serving: 200

Fettuccine Seafood Salad (Makes 6 Servings)

- 12 ounces spinach fettuccine (about 6 cups)
- 1 1/2 tablespoons salt
- 4-5 quarts boiling water
- 1/2 pound (about 18) shrimp, cooked, cleaned, and halved lengthwise
- 1/2 cup blanched bay scallops (about 4 ounces)
- 3 tablespoons chopped walnuts

- 3/5 cup milk
- 1/4 cup sour cream
- 1 tablespoon finely chopped dill
- Salt to taste
- Freshly ground black pepper to taste
- 1 tablespoon gold caviar

Gradually add fettuccine and salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until just tender. Drain in colander. Rinse with cold water; drain again.

In large bowl, combine fettuccine, shrimp, scallops, walnuts, milk, sour cream, dill and salt and pepper to taste. Toss to coat well. Garnish with caviar.

Calories per serving: 315

Golden Gate Pasta-Vegetable Salad (Makes 4 Servings)

- 8 ounces rotelle (about 4 cups)
- 1 tablespoon salt
- 3 quarts boiling water
- 8 slices bacon
- 4 cooked artichoke bottoms, sliced
- 4 cloves garlic, crushed
- 1 cup julienne red pepper strips
- 2 tablespoons chopped scallions
- 1/4 cup lemon juice
- 2 tablespoons olive oil
- Salt to taste
- Freshly ground black pepper to taste
- Boston lettuce
- Lemon and lime wedges for garnish (optional)

Gradually add rotelle and salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Rinse with cold water; drain again.

Cook bacon in large skillet over medium heat until browned and crisp. Drain on paper towel. Crumble coarsely and set aside.

In large bowl, combine rotelle, bacon, artichoke bottoms, garlic, red pepper and scallions. Pour over lemon juice and olive oil. Season to taste. Line a serving platter with lettuce leaves. Spoon salad in center. Garnish with lemon and lime wedges, if desired.
Calories per serving: 385.

Pasta-Fruit Salad (Makes 4 Servings)

- 8 ounces small macaroni shells (about 3 cups)

- 1 tablespoon salt
- 3 quarts boiling water
- 1 banana, sliced (1/2 cup)
- 1 unpared red apple, cored and very thinly sliced (1 1/2 cups)
- 2 cups raspberries
- 1/3 cup mayonnaise
- Freshly grated coconut or mint sprigs for garnish

Gradually add shells and salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Rinse with cold water; drain again.

In large bowl, combine shells, banana, apple slices and about 1/4 cup of the raspberries. Puree remaining raspberries by pushing through a strainer. Mix puree into the mayonnaise; mix well. Add to salad and toss to coat. Garnish as desired.
Calories per serving: 400

Fresh Fruit Compote a la Terczak (Makes 8 Servings)

- 2 cups raspberries
- 2 cups blueberries
- 2 cups strawberries
- 3 medium peaches, peeled and sliced (2 cups)
- 2 cups rainwater Madeira
- 1 1/2 cups white creme de menthe
- 1/2 cup orange juice
- Juice of 2 lemons
- Plain yogurt
- Ground nutmeg for garnish
- Mint leaves for garnish

In large bowl, combine berries, peaches, Madeira, creme de menthe, orange juice and lemon juice. Cover and chill. To serve, top each serving with a dollop of yogurt. Sprinkle with a dash of nutmeg. Garnish with mint leaf.

Calories per serving: 315

American Cuisine Chef Arrives in Big Apple

John Terczak, formerly executive chef at Gordon and Alexander restaurants in Chicago, has been recruited as executive chef of the American Stanhope hotel in New York City. Terczak has created new all-American menus for the hotel, and is in charge of all food operations.

The new setting is an ideal one for Terczak. Recently rechristened as the American Stanhope (formerly Stanhope hotel), the premises have under-

(Continued on page 8)

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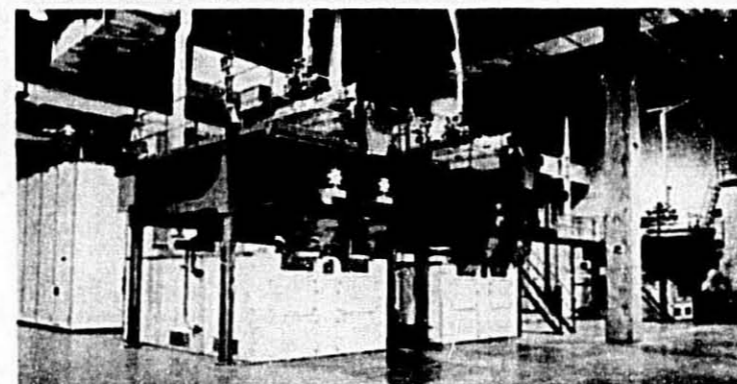
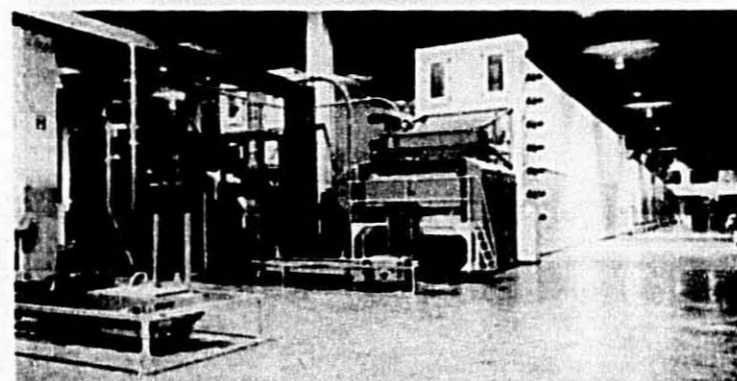
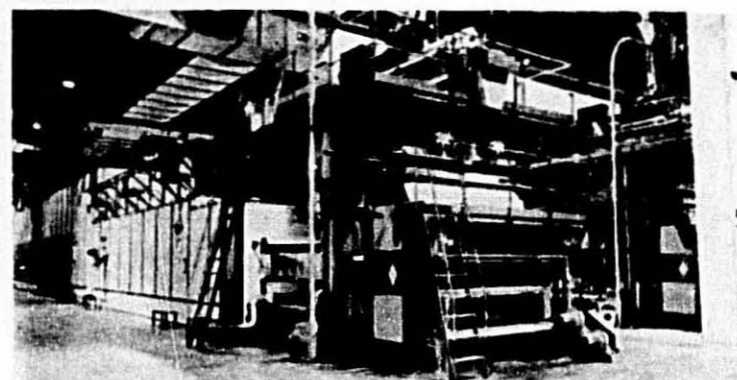


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NOVEMBER, 1983

American Cuisine Chef

(Continued from page 5)

gone a \$9 million renovation since 1980 and have been decorated primarily with 19th century American antiques and art. American cuisine is a major factor in the establishment's Americana restoration. Terczak, a pioneer in the emerging American cuisine, plans to experiment with such native foods as domestically-made dry pasta, turkey, Wisconsin apple cider, California goat cheese, Great Lakes fish, among others.

Terczak began his food career as a bus boy in Chicago's Henrici's at the age of 14. Later he took every course in classic cuisine offered at Dumas Pere (the late John Snowden's cooking school in Glenview, Illinois). He worked at various restaurants in the Chicago area ranging from Barnaby's to Biggs before joining Gordon for seven years including two years when he took on Lexander restaurant as well.

Pasta Consumption and Foreign Imports

Joseph P. Viviano, chairman of the National Pasta Association, announced that pasta consumption increased 4.6% in 1982 versus 1981. The gain was the industry's best in at least the last seven years. Continual gains through the early months of 1983 indicate the added consumption level is not only holding, but is actually increasing slightly.

However, Viviano pointed out, most of the gains in the industry today are coming from un-American pasta . . . import brands primarily from Italy. The foreign brands as a group had a share of 1.3% of all pasta sales in New York in 1981. By 1982, this figure has risen to 6.5% of sales. In the early months of 1983, foreign brands doubled their share from year-ago levels in both New York and Philadelphia, and now are spreading into Albany, St. Louis, Kansas City, Texas, the West Coast and in other markets.

Subsidized Imports

The U.S. Department of Commerce has documented that Italy exported 52.9 million pounds of pasta to the United States in 1982. Based on a projection of sales so far this year, that total will be at least 60 million pounds in 1983. The imports, which bear brand names denoting the foreign mystique of pasta's motherland, are



Joseph P. Viviano

subsidized by the Italian government at the rate of 10-12 cents for each pound sold.

Viviano stated that American pasta manufacturers will compete with anyone in quality and purity of product, production efficiencies, marketing skills, price values and any other element of the business — but to compete against 12 cents a pound government subsidy is completely unfair.

In October, 1981 the industry filed a petition with the U.S. Trade Representatives Office alleging the EEC export subsidies violate articles 9 and 8 of the Subsidies Code of the General Agreement on Tariffs and Trade or GATT.

In the spring of this year, a GATT panel of representatives of other countries ruled three to one in the industry's favor, marking the first clear-cut GATT victory for the U.S. in almost two decades. But the GATT panel decision did not end the matter. The panel reports to the Subsidies Code Committee of GATT. For several months now the matter has been debated before the Committee, but still no action has been taken. On June 13, President Reagan was urged to take action to give relief to U.S. pasta producers; in addition, industry leaders have contacted members of Congress with similar requests.

Viviano concluded by stating that imports today continue to flourish on supermarket shelves, subsidy intact, in violation of international trade law. This situation has begun to affect employment among American pasta manufacturers.

McKesson Announces It is Exploring Possible Sale of the C. F. Mueller Company

McKesson Corp. has announced that it has retained Morgan Stanley & Co., New York, to explore the possible sale of the C. F. Mueller Company, a wholly-owned subsidiary. Mueller, located in Jersey City, N.J., is the nation's leading manufacturer of pasta.

A McKesson spokesman noted that, if a decision to sell were made, the sale would be in line with the company's stated goal of focusing its future growth in the area of value added distribution. McKesson said that Mueller is an extremely successful operation and represents one of the premium grocery product brands in the marketplace. "The company will be sold only if it is fully valued by a prospective buyer," the McKesson spokesman said.

McKesson is the leading distributor of drug and health care products, wine and spirits, chemicals and bottled water. In fiscal 1983 ended March 31, McKesson reported revenues of \$4.1 billion and income from continuing operations of \$63.2 million.

Excerpts from the McKesson Annual Report

With the sale of Foremost D lines in December 1982, the Foods Group took a major step toward focusing its marketing efforts on branded non-commodity products.

Two of the group's three divisions are the market leaders in major food categories: *Foremost-McKesson Water Division* is the nation's largest distributor of bottled drinking water to homes and business establishments. The division operates under the proprietary labels Sparkletts, Alhambra and Crystal. It also markets water via 2,200 Aqua-Vend water vending machines in the western and southern states. *Foremost-McKesson Grocery Products Division* produces and markets pasta products through the C. F. Mueller Co., the nation's largest dry pasta company with a 23% share of its markets in the East, Midwest and South. *Foremost Food Ingredients Division* markets protein, lactose and other products derived from whey, a byproduct of the cheesemaking process, to pharmaceutical firms, food processors and infant formula manufacturers.

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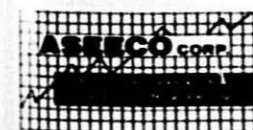
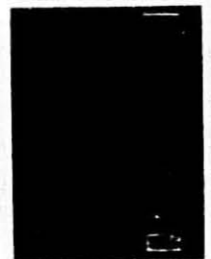
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McKesson Annual Report

(Continued from page 8)

The division also markets dehydrated onions, garlic and chili peppers to seasoning bottlers, food processors and food-service establishments.

The group's revenues and operating profit declined in fiscal 1983. Revenues fell 4% to \$319,609,000, with the decline attributable to the disposition of two product lines which contributed approximately \$25 million to fiscal 1982 revenues. Profitability fell 10% to \$32,158,000, stemming in large measure from weaker pricing for pasta products and losses associated with the expansion of Aqua-Vend.

In 1983, the Foods Group's Grocery Products Division recorded a decline in revenues, primarily resulting from the sale in 1982 of two non-pasta products: Milkman, a low-fat dry milk powder, and Magic Shell ice cream topping. Profits remained flat in 1983 as C. F. Mueller Co. introduced a new line of products and launched a competitive pricing policy to counter market challenges from private-label and imported pasta.

Sells in 22 States

Mueller's branded macaroni, rigatoni, spaghetti and other pasta products are sold in 22 states which account for 60% of U.S. pasta consumption. Over the past several years, U.S. pasta consumption has been growing at about 3% per annum. However, as a result of pasta's growing acceptance in this country, the \$1 billion pasta market is expected to increase to \$3 billion by 1991, according to a recent independent research study. Mueller's is well-positioned to reap the benefits of this anticipated growth in consumption.

In 1983 Mueller's entered the pre-packaged pasta side dish market with Pasta Shapes & Sauces, a new line of pasta and sauce combinations in five flavors. Introduced in all Mueller's markets in January, Pasta Shapes & Sauces has met with strong acceptance by consumers. Mueller's well-established sales force, substantial name recognition and strong advertising presence in each of its markets have been instrumental in the product's successful introduction.

The new pasta research laboratory at the corporate Research Center in Dublin, California, is developing and testing a range of improved dry pasta

products. Opened last year, the laboratory has in development a number of new Mueller's products.

C. F. Mueller's pasta operation saved \$1.4 million as a result of a number of productivity-improvement and cost-reduction programs;

C. F. Mueller's short-interval scheduling program has brought in savings of more than \$3 million since implementation in fiscal 1981 and last year reduced direct labor costs by \$220,000 over the previous year.

Seventeen's "Now You're Cooking" Competition

Thirteen national food advertisers have signed up as official patrons of Seventeen Magazine's fifth annual "Now You're Cooking" National Menu Planning Competition. The competition, which annually attracts hundreds of entries from teenagers around the country, is sponsored by the magazine each year to encourage the growing interest in food preparation among teens today.

"Seventeen's "Now You're Cooking" Competition was launched in 1979 after a *Seventeen* survey found that almost 94% of all teen girls prepare or help to prepare meals at home. More recently, a 1981 survey conducted by the magazine on teen girl's supermarket shopping habits revealed that, with the increase in mothers who work, nearly 75% of all teen girls now shop for food for use in their homes, spending an average of \$35.32 per week. This accounts for two out of every five dollars spent of a teen's family food budget, the survey found.

Sponsors

The official patron products of *Seventeen's* cooking competition are: Cool Whip; Crisco Shortening; Dole Canned, Chunk, Crushed or Sliced Pineapple; General Foods International Coffees; Jell-O Brand Pudding and Pie Filling; Jolly Time Pop Corn; Knox Unflavored Gelatine; Kraft Cheese and Cheese Products; Lea & Perrins Worcestershire Sauce; Pam No-Stick Cooking Spray; Rice-A-Roni; Star-Kist Tuna; and Tostitos Brand Tortilla Chips.

"Partymakers"

Contestants are required to use at least four of the official patron products, all of which are advertised in

Seventeen, in their menu plan recipes. In addition to being promoted at the event, the official patron products will also be featured in a special section on the contest in an upcoming issue of the magazine, as well as at *Seventeen's* "Partymakers" events, to be held in department stores across the country that month.

Twenty-eight teenage cooks have been selected as finalists in the competition, and invited to recreate their winning meals for the final judging by a distinguished panel of independent food experts, October 7-9, 1983, at the famed Culinary Institute of America in Hyde Park, New York. Four national winners, one for each of the four contest categories — "American Regional Cooking," "Dinner for Two," "Family Dinner," and "Party for Friends" — will each receive a \$500 award and an engraved trophy.

Open to All

Seventeen's "Now You're Cooking" Competition is open to all United States students in junior high, high school and college between the ages of 13 and 19. Finalists were selected from hundreds of entries by *Seventeen's* food editors, who judged the menus on the basis of nutrition, taste, appearance, creative use of ingredients, originality in menu planning, and appropriateness of cost. *Seventeen* will provide travel, meals, accommodations and entertainment for all finalists during the four days of judging and each finalist will receive an engraved trophy and patron product gift package. The teacher who sponsored each student will also receive a special gift package.

Dr. Richard L. Hall Elected President IUFOST

Dr. Richard L. Hall, vice president, research and development of McCormick & Co., has been elected president of the International Union of Food Science and Technology. He took office for a 4-year term during the IUFOST Congress in Dublin, Ireland, Sept. 18.

The IUFOST is an international association of more than 40 non-profit scientific societies around the world. Each nation holds a single membership in the Union through an organization active in food science and technology. The U.S. member society is the Institute of Food Technologists, of which Dr. Hall is a past president.

THE MACARONI JOURNAL

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Ernest M. Rollison

Golden Grain Appointment

Golden Grain Macaroni Company has announced that Ernest M. Rollison has been appointed to the company's newly created post of South Central Regional Sales Manager.

Rollison, a veteran of 13 years in the food industry, comes to Golden Grain from Durkee, where he was supervisor of sales. In his new position with Golden Grain he will work out of the Columbia, South Carolina area. Rollison will be responsible for all sales of company products in North and South Carolina, Kentucky, West Virginia and parts of Tennessee.

A native son of the south, Rollison resides in Irmo, South Carolina with his wife and three children.

Borden V.P. for Consumer Affairs

Borden, Inc. has elected Karen L. Johnson to the newly created position of corporate vice president for consumer affairs.

Ms. Johnson has responsibility for Borden's consumer-response system, Consumer Products public relations, the Borden Kitchens, and liaison with trade groups and non-profit organizations. She was previously vice president of consumer affairs of the Borden Consumer Products Division.

Ms. Johnson joined Borden in 1977 as director of consumer affairs for its foods division. The following year she was appointed divisional vice president-consumer affairs, retaining the title when the foods and dairy divisions were consolidated into the consumer products division in late 1980.

She came to Borden after 14 years with the Pillsbury Company, Minneapolis, where she had advanced to director of consumer services for its refrigerated products division.

Miss Johnson holds a bachelor's degree in dietetics and a master's degree in foods and nutrition from the University of Wisconsin - Stout, where she served on its board of business and industrial advisors and which presented her with its distinguished alumni award in 1977. She is a member of Home Economists in Business and a former member of its national board. She has served as chairman of the consumer affairs committee of Grocery Manufacturers of America. In 1983, she was inducted into the YWCA Academy of Women Achievers.

She will continue to have her headquarters at the company's administrative offices in Columbus.

Holiday Promotion

November—a special time for sharing and Borden's Home for the Holidays promotion will be in full swing with an exclusive Thematics Stand-Out insert appearing in the November, 1983 home delivered issues of Reader's Digest. Over 119,000,000 consumer offers appear in this insert. Pasta products include Luxury Brand of National Food Products and Creamettes of the Creamette Company.

Sybil Mobley on Hershey Board

Sybil Collins Mobley, Dean of the School of Business and Industry, Florida Agricultural and Mechanical University, has been elected to the Board of Directors of Hershey Foods Corporation, Harold S. Mohler, Chairman of the Board, announced recently.

Mobley is a member of the boards of directors of Anheuser-Busch Companies, Inc., Champion International Corporation and Sears, Roebuck and Co. She also serves on the Presidential Commission on Industrial Competitiveness.

She is also a member of the board of directors of the American Assembly of Collegiate Schools of Business, the Wharton Graduate School Executive Board of the University of Pennsylvania, the Visiting Committee of the Alfred P. Sloan School of Management of the Massachusetts Institute of Technology, the board of directors of the International Association of Black Business Educators and the Consultant panel to the Comptroller General of the United States.



GOLDEN GRAIN NAMES THREE VICE PRESIDENTS

The Board of Directors of the Golden Grain Macaroni Company announced the appointment of three new officers. Dominic Forte (left), sales executive and former General Manager of Golden Grain's Chicago plant, was named Vice President and Eastern Sales Manager. Forte will direct marketing activities for all Golden Grain products sold throughout the Midwest and eastern United States. "Big John" Palazzo (center), Golden Grain's top sales executive in Southern California, was named Vice President and Sales Manager for the company's Southern California Division. In his position Palazzo is responsible for the company's expanding sales activities in the area which includes Southern Nevada and Arizona as well as Southern California. Third to be named Vice President was Louis Bano, Golden Grain Controller. Bano, a member of the Institute of Corporate Controllers, has modernized Golden Grain's accounting department in recent years and introduced many new and efficient business procedures.

Lancia-Bravo Annual Report

Fiscal 1983 was a record year for the Lancia-Bravo Division. Earnings soared to an all-time record led by substantial volume and market share growth of high-quality Lancia pasta.

Lancia pasta is made with Semolina from 100% Canadian amber durum wheat, the best wheat in the world for pasta. The reward for this policy of using only premium raw materials and maintaining consistent product quality is evidenced by Lancia's strong market acceptance and position.

During the past year, sales of Lancia pasta grew at three times the rate of an extremely buoyant pasta market. The Lancia brand posted record volume and market shares for the third year in a row. The overall strength of the pasta market is the result of increasing consumer interest in pasta as a nutritious and tasty alternative to other main meals, plus consumer recognition that pasta offers top value for their money.

Sauce Sales Grow

Like the pasta market, the spaghetti sauce market continued to demonstrate rapid growth. Within this buoyant market, Bravo spaghetti sauce continued to show solid volume growth. Bravo spaghetti sauce, which is made from an original authentic homemade Italian recipe, continues to be the leader in the important and highly competitive Ontario market. Expansion plans into Quebec and Western Canada continued this past year, with solid gains in distribution and volume.

The Lancia-Bravo Division offers an extensive line of Italian style foods. Lancia pasta and Bravo sauce will continue to expand nationally and can look forward to increased volume distribution gains, improved market share and a number of innovative new products.

In A D M Annual Report

Acquisition by Archer Daniels Midland Co. of a substantial minority interest in Alfred C. Toepfer International, an international commodity trading group based in Hamburg, West Germany, reflects ADM's desire to increase significantly its ability to participate in major world markets, according to the company's annual report for fiscal 1983, issued recently.

Dwayne O. Andreas, chairman of the board and chief executive, and James R. Randall, president, emphasized, "We need to take full advantage of the export subsidies being paid by nearly every competitive country, instead of independently competing with the treasuries of their government."

Commenting on fiscal 1983, in which net income decreased for the second consecutive year from the record levels of fiscal 1981, Mr. Andreas and Mr. Randall stated, "While volumes were up in several of the company's major areas of operations the profit margins in these operations continued to be weakened by the lingering effects of past government policies, foreign government subsidy practices, depressed world economy and the impact of the strong U.S. dollar on our export market."

Sales Volume Up in Major Products

Management's discussion of operations and financial condition in the ADM report stated that sales volume gains of approximately 67% in corn products, 10% in oilseed products and 14% in wheat products contributed to the 1983 sales improvement.

"Sales of fuel alcohol increased 180% in 1983 from fiscal 1982, and added significantly to corn product sales volume", the report said. "Lower prices for soybeans and wheat in 1983 were reflected in sales prices and partially offset volume gains."

"Gross profits declined 21% to \$262 million in 1983 from \$332 million in 1982. Oilseed crushing and grain merchandising operations, which were depressed in fiscal 1982, continued to experience difficult market conditions resulting in lower gross profits. Increased demand for corn sweetener products and fuel alcohol improved the profitability of the corn product operations. Improved wheat flour export sales volume and profit margins in fiscal 1983 enhanced the profits of the wheat milling operations."

Acquisition Investments of \$42 Million

The A D M report showed that the company in fiscal 1983 invested \$42,081,000 for acquisitions, compared with \$12,500,000 in fiscal 1982. The company's equity in the net earnings

of Toepfer since the December 1982 acquisition are included in "other income," which totaled \$40,100,000.

In Pasta

At Gooch Foods, Inc., Mr. Andreas and Mr. Randall noted acquisition during the year of the D'Amico Macaroni Co. plant at Steger, IL, and of V. LaRosa & Sons Pasta Corp., Warminster, PA. The D'Amico plant was merged with Gooch Foods to service the Chicago area; LaRosa is being operated as a wholly owned subsidiary.

Paris Milling Co. and Sweetwater Feeds, the A D M officers stated, were merged into Gooch Feed Mill Corp. during the year, creating a new A D M Feed Corporation. "The newly combined company achieved record sales and profits during the past year," they stated.

Pillsbury First Quarter

The Pillsbury Company has reported that sales, net earnings and earnings per share for the first quarter of fiscal 1984 each set new records for the period.

Sales for the first quarter were \$929 million, an increase of 15 percent over sales of \$806 million for the same period in fiscal 1983.

Net earnings were \$34.8 million, compared with \$25.6 million, an increase of 36 percent. Earnings per share were \$1.60 and \$1.18, respectively.

William H. Spock, Chairman and Chief Executive Officer, stated "Pillsbury's first-quarter results were characterized by continuing strength across all of our business segments."

Highlights of the quarter include:

An outstanding performance by the Restaurant Group with operating profits over 45 percent ahead of the same period last year. The improvement was led by Burger King with a 14 percent increase in average sales per domestic unit compared to the first quarter of fiscal 1983. S & A Restaurant Corp., including Steak and Ale and Benjamin's, increased first quarter sales by 26 percent and also contributed significantly to the increase in operating profits.

Consumer Foods continued to record operating profit increases in its

(Continued on page 16)

THE MACARONI JOURNAL

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Pillsbury Report

(Continued from page 14)

domestic operations which included two-month's results for Haagen-Dazs acquired early in July. Gallons of ice cream sold by Haagen-Dazs increased over 30 percent in the two months compared with the same months last year. Consumer Foods operating profit from international operations was unfavorably impacted by the strength of the U.S. dollar.

Agri-Products made substantial progress in improving its grain merchandising operations and recorded solid gains for both industrial foods and feed ingredients.

"This very strong start to our 1984 fiscal year gives us even greater confidence in projecting Pillsbury's 13th consecutive year of improved sales and profitability," Mr. Spoor noted.

Pillsbury Stock Split

The Board of Directors of The Pillsbury Company voted a 2 for 1 stock split in the form of a stock dividend; one share of common stock for each share of common stock outstanding to be mailed November 30 to stockholders of record November 1.

At the same time, the Board voted to increase the quarterly cash dividend on common stock from 62 cents per share to 70 cents per share on a pre-split basis. The increased dividend will be paid November 30 to stockholders of record November 1.

William H. Spoor, Chairman and Chief Executive Officer, speaking at the company's annual meeting predicted that, "Earnings per share for the first quarter will exceed last year's first quarter by 30 percent or more." All of the gains are coming from operations and the strong performance is being led by the Restaurant Group and especially Burger King as well as the Consumer Foods Group. Significant improvement in Grain Merchandising results, compared to the previous year, is also an important contributor to the first quarter gains.

In other Board actions, Edward C. Stringer, Executive Vice President and General Counsel was elected to the additional position of Chief Administrative Officer of the company.

Richard C. Crowder was elected Senior Vice President, Strategic Planning and Corporate Risk Officer. He was formerly Vice President and Corporate Economist.

Jerry W. Levin, Senior Vice President, Corporate Development was elected to the additional position of Treasurer.

W. Donald Norris was elected Vice President Personnel and Organizational Planning. He was appointed to that position on September 1, 1983.

ConAgra Grows

Flexibility in planning and a "powerful presence across the food chain" will allow ConAgra, Inc., to seek the best opportunities for return on investment and growth and to pursue a wide range of alternatives in the food industry. Charles M. Harper, chairman and chief executive officer, points out in the company's annual report for fiscal 1983.

In reviewing developments at ConAgra as well as assessing its future, Mr. Harper points out that in the fiscal year ended May 29, 1983, "industry conditions kept reported earnings per share well under ConAgra's trend line earning power."

"We are not content to wait until our industries improve and generate higher reported earnings. Rather, we intend to keep building trend line earning power so ConAgra will reap substantially greater benefits as our industries improve."

ConAgra in fiscal 1983 had record net income of \$47,770,000, equal to \$2.59 per share on the common stock, up 45% from \$32,873,000, or \$2.51 per share, in fiscal 1982. Common shares outstanding at the end of fiscal 1983 averaged 18,391,235, up 40% from the end of fiscal 1982, reflecting the merger with Peavey Company. Net sales aggregated \$2,319,973,000, up 36% from \$1,709,599,000 the previous year. Peavey results were included in the last 10 months of fiscal 1983.

ConAgra in the fiscal year ended May 31, 1981, had net income of \$26,683,000, equal to \$2.21 per share, on sales of \$1,381,701,000.

In his comments to stockholders, Mr. Harper emphasized that ConAgra's management structure "must readily accommodate and take advantage of increased scale and earning power. In fiscal 1983, the Peavey merger and formation of a major new poultry company tested ConAgra's management capacity. There were no significant hitches in bringing our businesses together, and the process is largely

behind us. ConAgra is not just bigger, it is stronger—in management depth as well as earning power."

Noting ConAgra's strategy for its major businesses to hold a leading share in their markets, Mr. Harper pointed out that through the merger with Peavey, "ConAgra became the leading flour miller and largest publicly-held grain merchandiser in the U.S." ConAgra is also number one in crop protection chemicals distribution, poultry processing, frozen prepared foods brand, and shrimp processing.

Reduced Earnings at International Multifoods

International Multifoods Corporation reported reduced earnings for the second quarter ended Aug. 31, 1983, due to the significant devaluation of the bolivar in Venezuela. Earnings were \$6.2 million, or 75 cents per common share, on sales of \$254.3 million. This compares to earnings of \$8.1 million, or 98 cents per common share, on sales of \$266.6 million for the same period a year ago.

Discussing the company's overall performance, President and Chief Operating Officer Andre Gillet said, "Our operations continue to exhibit their fundamental strength, with worldwide volume up five percent. I'm particularly pleased with the second quarter earnings trends from our operations in the United States and Canada, and the excellent operational job our Venezuelan team has done in coping with price controls and currency devaluation."

In Venezuela

Commenting on the situation in Venezuela, Chairman and Chief Executive Officer William G. Phillips said, "Devaluation of the Venezuelan bolivar relative to the U.S. dollar during the second quarter negatively affected U.S. dollar reported earnings in our International geographic area, which were lower than last year by 39 cents per common share. Again this quarter, transactions we made in U.S. dollars and bolivars to protect our exposure to devaluation successfully offset 14 cents per common share of that decline for a net effect of 25 cents per common share. The devaluation also made it necessary to write down our investment in Venezuela by a direct charge

(Continued on page 18)

THE MACARONI JOURNAL

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International Multifoods

(Continued from page 16)

to stockholders equity of \$10 million, based on a rate of 12.5 bolivars to the dollar, which under current accounting rules does not affect earnings."

Operations Review

Reviewing operations by market segment, Gillet said, "Consumer segment volume improved worldwide, based on continued strength from Kaukauna cheese and Reuben and Smoke Craft specialty meats domestically, Bick's pickles and relishes in Canada and consumer flours in Venezuela. Results from family flour in Canada and peanut butter in the United States continued to be depressed, though the trend was encouraging at quarter's end. The Venezuelan devaluation caused Consumer earnings worldwide to be down."

Commenting on the Industrial segment, Gillet said, "Canadian performance continued to be excellent, and flour and prepared mix volume was strong in Venezuela and the United States. Durum and bakery mix margins were disappointing in the United States, though we expected improvement in the second half. The segment declined overall principally due to bolivar translation."

"In our Agriculture segment, worldwide earnings increased due to a strong performance from Supersweet Feeds in the United States, and good operating performances in Canada and Venezuela. As anticipated, the P.I.K. program caused us to record substantial losses in our seed corn operations since the amount of seed returned by dealers was much higher than normal. Our domestic pet food operations were depressed, but we are confident that second half performance will be improved," Gillet said.

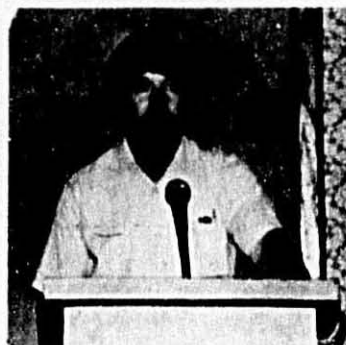
In the Away-From-Home Eating segment, Gillet said he was "very pleased by a substantial increase in earnings from Mister Donut in the United States, and a significant rate of increase in new shop openings worldwide. Earnings for this segment declined as customer counts remained down in our restaurants this quarter. We have taken actions that should have a beneficial impact on customer counts during the balance of the year."

Looking Ahead

Looking ahead, Phillips said, "Our domestic businesses are beginning to

benefit from the improvement in the economy, and our market leadership positions in Canada and Venezuela are secure. We are confident that earnings from our non-Venezuelan businesses will show substantial increases over last year. The challenge we face in achieving our 16th year of increased earnings is spurring performance to a level that will overcome the uncertain effects of bolivar devaluation."

Minneapolis-based International Multifoods is a diversified food company operating principally in the United States, Canada, Venezuela, Mexico and Japan. The Company completed its most recent fiscal year on Feb. 28, 1983, with sale of \$1.1 billion and net earnings of \$35.5 million or \$4.32 per share of common stock.



Norman Weckerly

Norman Weckerly Testifies on Farm Policy

On July 5, 1983, Norman Weckerly testified before a Joint House-Senate Economic Committee on the topic "Toward the Next Generation of Farm Policy." At this hearing Norman presented a statement of position on behalf of the U.S.D.G.A. Following is the text of that statement:

"The U.S. Durum Growers Association was organized in 1957 to represent the specialty class of wheat known as durum. Durum wheat has unique qualities and has a limited, but important market. Its primary use is in pasta products and in North African countries is used in a cereal-like preparation called Kuis-Kuis.

Historically, 85 percent of the U.S. production of durum has been in North Dakota, however, in recent years production has expanded to Arizona and California, due to plant breeder advances and premium prices.

Our organization has some specific recommendations to make in the formulation of farm policy:

We favor freezing the target price. We favor lowering of loan rates to allow U.S. wheat to be more competitive in world trade—50 to 60 percent of durum wheat production is exported.

We favor a policy of responsible reserve stocks, but this should not exceed 30 percent of our annual domestic and export needs.

We believe our reserve stocks should be reduced to this level and a cap put on them.

The majority of this should be on a farmer-owned reserve with storage paid to farmer.

We favor a trigger mechanism for the release of these stocks based only on the average price of durum, not on the national average for wheat, as it presently is.

The selective use of export subsidies should be practiced to remain competitive in the near term until world stocks are reduced to the point that farmers can receive adequate return from the marketplace.

Last, but not least, considering the over-capacity we have in agriculture today, we favor some form of long term land retirement program. We feel this be good for soil conservation, wildlife, farmers, and also be less costly for the government, both in direct costs and administrative costs."

Durum Seeding Reduced: Marketable Supplies To Expand

After binning two of the largest Durum crops ever in 1981 and 1982, growers recognized the resulting record stocks and below-loan rate market prices and enrolled heavily in the 1983 wheat program. Spring plantings were reduced to the smallest area since 1972—2.5 million acres, compared with 4.4 million in 1982 and 5.9 million in 1981. North Dakota's seedings, which account for 82 percent of U.S. Durum acreage, were cut back 41 percent for a year earlier.

Plantings of the Southwestern (California and Arizona) "desert Durum" were down 31 percent from 1982 and 62 percent from 1981. Over half of the acres put into conservation use were the result of producer participation in the whole-farm and 10 to 30 percent PIK program. Because of the

PIK payment, a large share of carryover stocks currently locked into the FO will become available to the market. Heavy reserve loan activity during 1983 tightened free supplies and spoiled a late-season price rally, but the forthcoming PIK transfer and the August harvest will more than double free Durum supplies for 1983/84. Correspondingly, this year's farm prices will likely duplicate last season's pattern and settle near the loan rate. However, this expectation is predicated upon continued favorable development of the 1983 crop and realization of the current 1983/84 Durum export forecast.

WORLD WHEAT PRODUCTION (Million Tons)

	82-83	83-84
U.S.	66.0	76.4
Canada	30.0	27.6
W. Europe	67.0	68.1
E. Europe	31.8	34.7
USSR	85.0	86.0
China	76.0	68.4
India	41.0	37.8
Turkey	13.3	13.8
Argentina	11.5	14.5
Australia	17.0	8.8
World	480.4	480.4

International Durum Forum — November 16-17 — Annual program, Ramada Inn, Minot, N.D. Sponsored by U.S. Durum Growers Association, Minot Chamber of Commerce Ward County Improvement Association. Be Hoag, North Central Experiment Station, Minot, N.D.

Canada Durum Production

Canadian durum production was estimated at 99,000,000 bu. at the end of August, down from 114,700,000 last year.

Amber Durum Wheat

The Canadian Grain Commission, Grain Research Laboratory Report for 1982 carries the following information on Amber Durum Wheat.

Effect of nitrogen fertilization on the quality characteristics of five North American amber durum wheat cultivars. Five North American amber durum wheat cultivars were grown at three levels of soil fertility by applying N fertilizer (Ammonium nitrate 34-0-0) at 0, 50 and 200 kg/ha. Test weight and kernel weight decreased with increasing N fertilizer, but semolina milling yield was not affected. Protein levels increased for all cultivars

U.S. DURUM SUPPLY AND DEMAND

(In Millions of Bushels)

	83-84	82-83	81-82	80-81
Beginning Stocks	142	108	60	61
Production	81	148	186	108
Total Supply	223	259	248	171
Domestic Use	46	58	58	52
Exports	60	59	82	59
Total Use	106	117	140	111
Carryover	117	142	108	60

at each level of N fertilizer, but kernel hardness, as measured by semolina granulation, was not affected. Gluten strength and gluten protein solubility in lactic acid were not influenced by level of N fertilizer. Spaghetti pigment decreased with increased N fertilizer level due to the combined effects of decreased semolina pigment and increased pigment loss during spaghetti processing. Pasta dough farinograms exhibited spaghetti processing. Pasta dough farinograms exhibited decreased mixing times, increased maximum consistency and increased tolerance index values with increasing N fertilizer due to increasing protein content. As N fertilizer levels increased spaghetti cooked weight decreased, solids lost to cooking water decreased, and cooked spaghetti resilience and firmness improved at both optimum cooking time and after cooking for ten minutes. All the cooking quality effects could be attributed to increased levels of protein at high N fertilization levels.

Measurement of cooked spaghetti stickiness using the GRL Compression Tester. The GRL Compression Tester, designed for assessment of bread crumb texture, has been modified to permit measurement of cooked spaghetti surface stickiness. The basic principle of the test procedure is to compress cooked spaghetti strands under a plunger and, upon the force of adhesion of the spaghetti. Spaghetti samples as small as 6 g can be tested. Samples tested to date show a range in stickiness from about 400N/m² to 900N/m². Standard deviation of the test is about 40N/m². Test results seemed to be in good agreement with subjective assessment of cooked spaghetti stickiness by an untrained taste panel.

Sept. 30 price per cwt. f.o.b. mill, Minneapolis: Semolina, \$13.90 @ 14.

Factors influencing spaghetti stickiness and their relationship to other cooking quality characteristics. Spaghetti was processed from a wide range of raw materials by a laboratory-scale continuous extrusion press and dried by both a conventional low temperature (LT) and a high temperature (HT) drying cycle. Stickiness and other important cooking quality parameters were determined in cooking waters of varying hardness. Cooked HT spaghetti was less sticky, more resilient, firmer and had lower cooking loss than the corresponding LT spaghetti. Stickiness and cooking loss increased with cooking water hardness but firmness and resilience were unaffected except in very hard water. Significant differences in stickiness were noted among durum wheat cultivars. Stickiness was not as strongly influenced by protein content as were cooking loss, resilience and firmness. Sprout damage appeared to have no effect on stickiness. Addition of durum flour to semolina resulted in increased spaghetti and a general deterioration in other cooking quality factors, particularly for LT spaghetti. Addition of hard red spring wheat farina or flour resulted in very sticky spaghetti and marked deterioration in resilience and firmness. Stickiness was significantly correlated to cooking loss, cooked weight, degree of swelling, compressibility, recovery and firmness. However, when all these factors were included in a step-wise regression less than 50% of the variance in stickiness could be predicted.

Effect of harvesting method and processing conditions on spaghetti quality. This study, mentioned in last year's report, is continuing. The three cultivars, grown in 1982 and harvested by three different methods, were evaluated to determine whether harvest

(Continued on page 22)



Peavey

Sales Offices

Spaghetti Quality

(Continued from page 19)

method can influence quality rankings in the durum wheat test program. The effects of storage of wheat semolina and spaghetti on quality ranking will also be examined.

Available lysine in spaghetti. This study, on the effect of drying conditions on the extent of lysine loss in spaghetti, is continuing. Factors being examined include drying temperature, duration of exposure to high temperature during drying, the moisture content of spaghetti at the onset of high temperature and amino acid losses during cooking. Preliminary results indicate that lysine availability does decrease because of high temperature drying. When spaghetti is dried at 80°C, only 71% of the lysine is nutritionally available.

Massachusetts Bulk Food Guidelines

The guidelines for display and upkeep of bulk foods released recently by the Massachusetts Food and Drug division, in addition to container and utensil requirements in Section 8, include seven other specifications that must be met before products can be dispensed.

A draft of the guidelines, scheduled to go into effect Nov. 1, was presented at a seminar held by the Massachusetts Food Association and attended by retailers, wholesalers, equipment manufacturers, brokers and food companies.

Milton Segel, president of MFA, said that the seminar was planned so that industry representatives could "work together to comply with the regulations." The guidelines are said to be the model for forthcoming Federal guidelines.

The Massachusetts guidelines require containers that are easily cleaned and sanitized and that have tight-fitting covers with self-closing mechanisms. Utensils should be stored in protective sleeves, the primary method suggested.

Plan Review

Among the seven specifications that precede the container and utensil requirements is plan review and approval. It is stated that installation or establishment of a bulk-food sales area is considered to be an alteration or re-

novation, and therefore it is recommended that plans be submitted to and approved by the proper state or local agencies.

Plans are essential, it is felt, to eliminate the possibility of installations that do not provide for "sanitary conditions relative to the dispensing of bulk foods."

Plans and an accompanying detailer narrative shall include a full listing of all items to be displayed for sale, and (a description of) how the operation shall be maintained in a sanitary condition."

The plans must fully describe the personnel training program, supervision to be exercised, cleaning procedures, cleaning schedules, rotation schedules, personnel hygiene and consumer education practices to be employed such as signs and flyers.

It is further stated that stores should designate an employee to assume responsibility for the maintenance and standards of the bulk-foods sales area. Employees must be trained in customer surveillance and product knowledge.

Each bulk-food storage container and dispenser/display unit must be labeled in accordance with current state and Federal laws.

Written Instructions

Written instructions and consumer information must be printed clearly on signs prior to the time of sale. Ingredient listings for all bulk foods will be posted at the display/service unit. Correct use of serving utensils should be conveyed to customers by signs and employe instruction. No-smoking signs must also be posted in bulk-food areas.

Section 5 requires that all types of containers in backroom storage must be clearly identified as to content, that stock rotation will follow the first-in, first-out principle, that all bulk food containers in backroom storage be marked with production dates or code numbers, that display bins be emptied completely and relined before refilling, and that signs will require that customers leave all dispensing utensils stored in protective sleeves, or stored clean and dry.

Cleaning and sanitation requirements state that such schedules should be "adequate to insure cleanliness of utensils, display units and lids." The minimum cleaning frequency is daily, but "will be more often if required."

Stores must have adequate facilities and approved chemical supplies to ensure that requirements of company cleaning and sanitizing schedules are met. If necessary, in-place cleaning of display units may be performed by store personnel using disposable wipes. The "casual application of household cleaning agents is prohibited."

Pest Control

Pest control surveillance will be performed daily, and monthly inspections are required. The casual use of household insecticides by store personnel is prohibited.

Application of pesticides where needed will "proceed as per company policy and only under the direction of a qualified technician after adequate precautions have been taken to protect the product and product contact surfaces." All display units and lids will be designed to "minimize the possibility of pest access and/or harbourage."

Foods identified in the guidelines as potentially hazardous must be dispensed by store personnel.

Three food categories may be dispensed in bulkfood containers if all container and utensil requirements are met, as well as guidelines one through seven.

These three categories may be dispensed by store personnel, by gravity dispensing containers, or by dispensing systems that "protect foods from handling, adulteration or contamination from any source." They may be dispensed by customers "from an approved container as referred to in Section 8 provided that all requirements of Sections 1-8 are strictly adhered to."

Not Potentially Hazardous

Foods that are not potentially hazardous, such as peas, beans, grain, pasta, nuts in the shell, dried fruits and wrapped candies may be dispensed by customers from approved containers with dispensing utensils referred to in Section 8.

Liquid nonhazardous foods such as oils, honey and syrups may be dispensed by employees in pre-packaged form, or by customers using a gravity feed system.

Pet foods may be dispensed by customers from an approved container if there is physical separation from human food locations and the product is identified by signs.



CONTROLLING EXUBERANCE:

A Guide to Profiting from Change in Mature Industries

We have described how a Strategic Opportunities Profile and an Innovation Budget are used for the identification and analysis of strategic opportunities within a business.

However, identifying good strategic opportunities is not enough. There are at least two major stumbling blocks to exploiting these opportunities.

The first is that the management systems of many large U.S. corporations discourage the entrepreneurial activities and risk-taking necessary for a new venture. We will cover this subject in more detail later.

The second major reason why good strategic opportunities are not developed is the lack of a sensible implementation plan. We find that many companies become so enamored of exploring new ideas or so engrossed in launching a new product line's potential features that they never overcome the initial production difficulties or develop a realistic Market Attainment Plan. Initial sales goals are usually highly unrealistic, and the problem is compounded by equally unrealistic first-year production targets.

Most of these difficulties can be avoided by a combination of experienced new product counsel and a proper Market Attainment Plan. A

DISCOVERING THE FOUNTAIN OF YOUTH: AN APPROACH TO CORPORATE GROWTH AND DEVELOPMENT

A Presentation by Roger W. Hearne and Kathleen Crispell Blackmer, Arthur D. Little Inc.

Market Attainment Plan describes how the company can move from its current position to where it must be in order to profit from the opportunities identified in the Strategic Opportunities Profile.

The relationship between the Strategic Opportunities Profile and the Market Attainment Plan is shown below:

Corporate Development Flow

Preparatory Work; Strategic Opportunities Profile; Selected Opportunities Explored in Greater Depth; Best Opportunities Selected; Market Attainment Plan Developed; Operating Plans Developed in Detail; Capital Appropriations Prepared and Submitted; Business Start-up.

Financing Source

Previous Year's Innovation Budget; Current Innovation Budget; R&D Budget; Current Innovation Budget, R & D Budget; Current Innovation Budget; Current Innovation Budget; Normal Operating and Capital Budgeting Systems.

In short, the Strategic Opportunities Profile tells you where you want to go, and the Market Attainment Plan tells you the most sensible route to follow to get there.

To construct an intelligent Market Attainment Plan, you must first consider whether it is more sensible to reach the goal through:

- Internal development or
- Acquisition.

For example, the Strategic Opportunities Profile may have identified an important market emerging from the lower costs of a new key technology, such as using cold forming of steel to manufacture consumer hand tools. The Innovation Budget will typically allow the exploration of the opportunity to the point where several major conclusions can be reached:

1. The cold forming of steel is used by a variety of U.S. companies



Roger W. Hearne

producing products closely related to consumer hand tools.

2. Excess capacity exists in a significant number of these companies because of the downturn in the automotive markets.
3. The value of cold forming technology is usually not reflected in the stock prices of these companies, and a number of the better companies sell well below the liquidation value of their assets.
4. Cold forming is likely to replace hot forging for many consumer hand tools over the next 15 years.

At this point, management might decide to create a Market Attainment Plan based on an acquisition. The Market Attainment Plan for a successful acquisition is as complex and detailed as an interim development plan—yet often prone to failure because of inexperience. For example, we might discuss the following ideas with a client before constructing a Market Attainment Plan based on acquisition.

Given acquisition premiums, you should not expect a high return on investment unless:

(Continued on page 26)

Pasta Prescription

Prescribe pasta. It could reduce the risk factors associated with coronary heart disease.

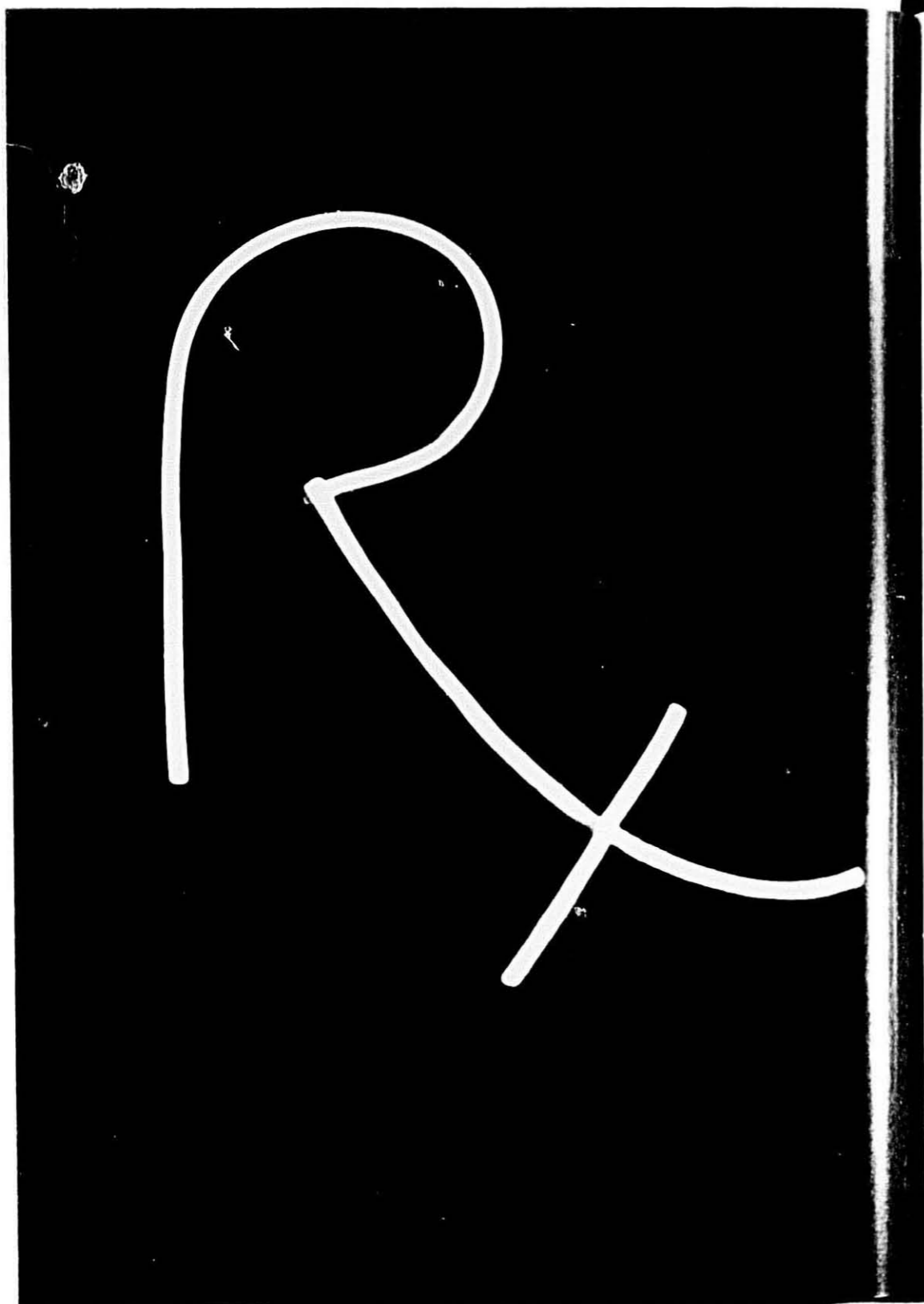
How does this relate to pasta consumption?

...
...
...
...
... saturated ...
... substitute unsaturated fats ...
... not ... not ...
... is ...

Pastas - let's tell it like it is.

ADM

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



Controlling Exuberance

(Continued from page 23)

- The acquisition is in a related industry and offers synergy;
- The acquisition is distressed and you can improve its performance;
- The acquisition is small and obscure and "only you could love it."

Search first in those areas most closely related to the businesses you know and in which you excel. Search in "concentric circles" and work slowly outwards, making sure you have not missed an obscure and undervalued opportunity in a closely related business.

Buying companies is like buying stock. Only the thoughtless buy when the stock is highly touted and highly priced. Forget the enthusiasm of the trade press and Wall Street's latest recommendations unless you wish to outbid the public to take the latest growth *wunderkind*. In addition, hundreds of companies are looking at the same target.

The current owners of an acquisition candidate always know more about it than does a potential buyer. As a result, bargains are few and far between. This means you may have to process 300 companies to find 10 satisfactory candidates, and eight of these will remain stubbornly over-priced. Keep companies coming through the analytical pipeline in parallel, with at least three very promising candidates working simultaneously. Otherwise, you may become emotionally committed to one because it is all you have in the pipeline. Analysis costs are trivial compared to the losses you will incur from a bad selection.

A friendly acquisition almost always involves a higher purchase premium and may still generate lawsuits and controversy. The search for a friendly acquisition may eliminate a number of candidates which would be a better match for your company. And, finally, a friendly acquisition may involve long management contracts with the managers of the acquired company.

Someone can find something significantly wrong with any company, particularly when a purchase premium is involved. To counteract this phenomenon, strong advocacy and commitment by management are necessary to make a major acquisition occur.

When acquisition search and some negotiations can be delegated to others,

the Chief Executive Officer can delegate neither the initial contact with his counterpart at the candidate company nor the personal discussions to establish working relationships. In addition, the Chief Executive Officer must be an advocate with his Board of Directors and educate them about the reality of the acquisition process and the initial return on investment.

You can tell relatively little about a potential acquisition from the outside. The owner of a company can juggle the books more effectively than you can decipher them from the outside. Reach enough of a "pro forma" agreement so that you can get a sophisticated business analyst inside the company, and let him determine its real value.

Typically, only three or four candidates will fit the acquisition criteria closely and be willing to sell at a reasonable price. Good candidates should not be eliminated unless there are substantial reasons, as the alternatives may be even poorer.

There is nothing worse than having a bank lending officer running your company—except having it turned over to a Chapter 10 Trustee. Do not overuse-leverage, overreach, or expand so fast you cannot absorb the results of a mistake.

If these illustrations of the dangers of an unmapped acquisition program are not sufficient, consider the risks of an unmapped market entry through internal development.

Although a company may already be in a particular industry, we find it is often unfamiliar with the skills necessary to introduce a new product line profitably. Often, the company's managers gained their new product experience in growth industries, and they may not understand that the rules of the game are quite different in a mature industry. Previous experience in a growth industry may be misleading in several ways:

- The product life cycle is usually different in a mature industry.
- Combating entrenched competitors in a mature industry frequently requires the use of non-traditional strategies.
- Distinctly different planning methods are necessary to handle the different characteristics of a mature industry.

To understand these points, it will be helpful to look at some of the basic

principles of the industry life cycle and understand what these mean in terms of selecting practical, funded market entry strategies.

Let us start with a basic concept: the industry life cycle is the sum of all of the product line life cycles that constitute the industry. This simple statement reminds us that industry maturity reflects an underlying and more basic structure.

For example, an industry usually begins with a general purpose product line introduced by an early entrepreneur, like Henry Ford in automobiles. A lot of time and effort are needed to develop primary demand, introduce customers to the product's benefits, and to create sensible channels of distribution.

In its early stages, an industry and its first product line follow the same growth curve. In fact, total industry volume is exactly that of the first product line—the Model-T Ford, for example. The first product line usually has a gradual buildup of volume over time as the market develops, and then an abrupt down-curve.

The down-curve is caused by competitors introducing improved and more specialized product lines. As the industry develops further, market needs become clearer and new competitors enter, introducing their own product lines which are targeted toward different segments of the market. Thus, the Cadillac and the Stutz Bearcat were introduced at high-income segments of the automobile market, while the Chevrolet was positioned to appeal to the segment of lower-income consumers who wanted an enclosed automobile.

During the growth phase, the consumer learns something about automobiles. There are a few rudimentary service stations and several auto dealers, and the product's characteristics are no longer a mystery to consumers. In short, an industry structure is developing, primitive channels of distribution are in place, and some sources of capital appear—either from profits or from financial institutions and investors who can see a new market developing.

As the industry structure develops further, the introduction of new product lines becomes easier, and their volume expands more rapidly because the consumer is more knowledgeable, the dealers better established, the

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THE MACARONI JOURNAL

Pasta! Today's All-American word for fun. A powerhouse of nutrition in all shapes and sizes. High in energy-producing carbohydrates. Lower in calories than many popular weight-control foods. A reliable source of iron and hard-to-get B-complex vitamins. *Pasta!* Elegant enough for gourmet tastes. Light enough for America's new fitness generations. *Pasta!* Made best from Amber Mills Venezia No. 1 Semolina, Imperia Durum Granular or Crestal Fancy Durum Patent Flour. Make sure your pasta products are as fit as the crowds they feed. Shape 'em up with Amber's pasta performing ingredients.



AMBER MILLING

Mills at Rush City, Minn. — General Offices at
St. Paul, Minn. 55105/Phone (612) 641-3796

Pasta makes fitness look like fun.



Controlling Exuberance

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financing institutions more experienced, and the salesman more familiar with his customers. As a result, the front side of the product line life cycle steepens.

In the late growth phase of an industry, competitors have learned to match a product line innovation with remarkable speed. A product line introduced into a late growth industry is likely to be very steep on the front slope because it achieves more rapid distribution through a more sophisticated industry. However, it is also likely to peak more rapidly as competitors enter with similar product lines and drain off the available market. As you can see in the illustration, the product line life cycle assumes a significantly different form than we saw earlier.

By the time an industry reaches maturity, the industry structure is complete and detailed. Competitors are now even more sophisticated. Several market research firms have already investigated the consumer's eyeblink rate while buying the goods and have speculated on several ways the consumer might be made both to spend and blink faster. We know whether the male consumer prefers his car to be a sports car, a hardtop, or a close personal friend. There are several trade magazines, and each of them is dull.

What happens when we introduce a new product line into a mature industry?

Typically, we observe a steep front slope as introduction occurs. It will appear to the management of the company producing the new item that it is more successful than any other product line they have introduced. And, for a short period of time, that may be true.

But then what typically happens is that competitors begin to plot counter-strategies when they discover the new product line in a test market. If they believe the line will be successful, several probably gear up as fast as they can to produce copies at a slightly lower price.

What does this mean about the shape of the product line life cycle in a mature industry?

It will rise rapidly, but it is likely to flatten out equally rapidly, to resemble an upside-down "L." Rapid

acceptance tends to be followed by equally rapid flattening, as competitors enter with their own "knock-off" lines or use pricing and other techniques to protect their position.

Imagine the management of a business competing in a mature industry that introduces its first new product line in several years. Its product managers will proclaim the greatest new product line success in this history of the company. And, they will be able to prove it with actual results—for perhaps 18 months. Then, competitive lines come in, and the initial competitive advantage is lost.

There is another characteristic of mature industries that compounds the problem. Most companies operating in mature industries have managerial systems which typically require several levels of painstaking review before action can be taken. Ironically, although the product line life cycle has come to change direction more rapidly, management's reactions have become more deliberate and structured. As a result, the flattening of sales shortly after introduction is rarely recognized before some time has passed. By then, the company may have built a new, automated plant that needs to operate at full capacity to make money. After all, that is exactly what some strategic planning formulas teach us to do in a mature industry—go for the lowest possible costs by building large, high-volume plants.

An example of this particular situation occurred with a company that manufactured cruising sailboats. The founders understood that, despite the industry's apparent maturity, there was a large unsatisfied demand for yachts that at least looked as if they could sail around the world safely. They copied the design of an old English yacht that sailed quite poorly. Their product was also significantly overweight and therefore expensive to manufacture. The boat's principal virtue was that it looked both traditional and authentic.

It sold like wildfire.

The company then made a classical mature market mistake. It invested heavily in new production facilities, expanded its organization to produce several more models—and then within three years, found competitors on the market with identical looking, but less expensive, copies from Taiwan. Today, the original corporation is bankrupt. Its product line life cycle had a spec-

acular rise, but the sudden fall off was brutal. What it derived from its learning curve was bankruptcy.

What lessons does the above example offer about bringing internally developed innovations into a mature industry? Let us suggest several, not as absolute truths but as guidelines:

- First, if a new product line is initially successful, try to temper your expectations. Do not automatically assume that the same rate of growth will continue over a long period of time.
- Second, be realistic about the length of time that it will take for competitors to match your innovation. Plan to exploit that temporary time advantage by following a well-developed aggressive Market Attainment Plan and permit yourself a minimum of tentative dabbling.
- Third, maintain a management system that allows rapid response to competition. Do not busy the new product line within the "other responsibilities" that a busy manager may have. Do not require it to adhere to normal, deliberate, and, perhaps, self-defeating budget and review processes.
- Fourth, develop a product line strategy that is realistic about market-place and competitive conditions. In fact, it is usually essential to avoid an early, head-to-head battle with entrenched competitors.

Given these guidelines, how can a wise internal Market Attainment Plan be developed? We adapt the Market Attainment Plan process to the individual needs of each client. However, preparation of a typical internal Market Attainment Plan might proceed as follows:

The first step is to review the results of the Strategic Opportunities Profiling session with emphasis on the competitive dissection and bases of competition within the target market segment. The key information and subsequent results of research efforts among users are organized in a document and circulated to key task force members in preparation for a planning session. Depending on the ground covered in the initial Strategic Opportunities Profile, and the complexity of the issues

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Pasta is a product known around the world.

Buhler-Miag is known around the world as a leader in pasta manufacturing equipment.

And Buhler-Miag is also an international leader in milling equipment and systems for semolina and flour.

So if you want to take advantage of worldwide expertise in both industries, consider Buhler-Miag. A company that

spans the pasta and milling industries, as it spans the globe.

Buhler-Miag conducts business in over 100 countries throughout the world. International headquarters in Switzerland. U.S. headquarters and manufacturing facilities in Minneapolis, Minnesota.

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to be resolved, we then schedule a one- to two-day planning session to include those who attended the original session and any other members of management who will be directly involved in implementation.

The meeting typically starts by exploring the proposed innovation and all of its characteristics. We discuss the target audience, competitive products, the margins the product should generate, and its other key attributes. We also describe the results of our market investigation, including important facts that our client may not have known. The participants also agree on the stage of maturity of the marketplace, the pattern the product line life cycle should follow, and several other factors which in the view of the participants are essential to success.

The next step in the creation of the Market Attainment Plan is the most enjoyable and creative. We use competitive role-playing as a major part of strategy formulation. The client determines a preliminary entry strategy, and we play it against the actions the competitors are likely to take. This is the point at which our careful study of the competition pays important dividends. The actions and reactions, the unexpected traps, and the changes in strategy that result are both fascinating and valuable. For example, the proposed market entry may be directly against a competitor's most important geographical area — one which the competitor will fight hard to defend. This means margins might be cut unexpectedly, extra promotional expenses incurred, and roll-out distribution delayed while the battle is fought. In turn, this requires lower initial sales plans and production targets.

The objective is to develop a final plan that deals successfully with real world conditions and competition. Also, the client gains a better understanding of the strategies to avoid and of the competitive danger signs. Then, when these danger signs appear, the client knows the correct counter-action to employ.

The final steps in the meeting are to fine-tune the Market Attainment Plan and to make certain the client has adequate resources to execute it. In this, as in its earlier aspects, the Market Attainment Plan is reminiscent of how business unit strategies are pre-

pared, except that the Market Attainment Plan focuses at product line rather than business unit level.

If the Market Attainment Plan is being created for a mature industry, it also differs in its careful attention to two particular factors:

- Competitive analysis and the use of role-playing techniques, and
- The use of special entry strategies designed to exploit mature market conditions.

The entry strategies which are successful in a mature market can be significantly different from those used in other markets. Following are some recent examples of entry strategies that employed techniques possible only in mature industries. One example is provided by a shopping center development firm that decided to enter a competitive urban East Coast market. The firm knew that good shopping center property would be difficult to obtain at reasonable prices. As a result, it decided to enter the market through the back door.

It gained control of a large money-losing retail company that owned a significant amount of shopping center real estate that was undervalued on its books and not reflected in its stock price. The acquisition and subsequent property development have gone well. The retail company's excess cash and the liquidated value of its other assets will more than pay for both the acquisition and the subsequent development of its real estate.

Acquisition of a failing company and stripping it of its undervalued assets illustrates two points:

- First, there are low-cost, indeed self-financing, entry strategies that can be used in a mature market that are not usually available elsewhere.
- Second, if you fail to develop new opportunities in a mature industry, your own company may become vulnerable to a takeover.

The second example of a thoughtful mature market entry strategy is that of Coca-Cola and its entry into the wine industry. When Coke entered, it did not attempt to buy a fully integrated wine producer, with its massive investments in vineyards and production facilities. For one thing there were few such prospects, and they were prohibitively expensive to purchase. Instead, it bought a small, profitable New York State winery named Taylor.

Coke realized something about the bases of competition in wine that few others did. It recognized that the typical consumer is confused by the complicated array of grape names, long and French subtitles which characterize current wine labels. Consumers would gladly depend on established brand names, as they do in other beverages. Indeed, Mateus had already proven that the consumer will readily buy a wine without knowing the name or age of the grape in the bottle.

Coca-Cola's market attainment plan was to acquire Taylor, build a brand franchise by repositioning Taylor as a quality brand name, and purchase its product from bulk producers. It avoided heavy investment in vineyards and production facilities because the potential savings in operating costs were not as important to its success as was building a brand franchise. Taylor California Cellars is now a major brand in the U.S. market.

The following list of mature market entry strategies is intended to stimulate your taste for nontraditional thinking rather than to be all-inclusive.

1. Acquire and Rationalize

Acquisition rather than internal development is particularly applicable to a mature industry because it removes a potential competitor. An example of acquisition and rationalization is the shopping center developer. To some degree, Coca-Cola's market attainment plan for Taylor fits into this category as well, as it rationalized the need for integrated facilities in the wine industry.

2. Acquire and Consolidate

Companies which operate in a limited geographical market, such as retailers, wholesalers, and building materials manufacturers, often use acquisition and consolidation of similar companies in new geographical areas as a method of expansion without creating new competition. Some companies use this strategy to acquire new product lines and consolidate them into their existing marketing systems.

3. Develop a Specialized Niche

Often a niche can be developed that is relatively free from competition. A niche can be created, for example, through technology, raw materials sourcing, or geographical location.

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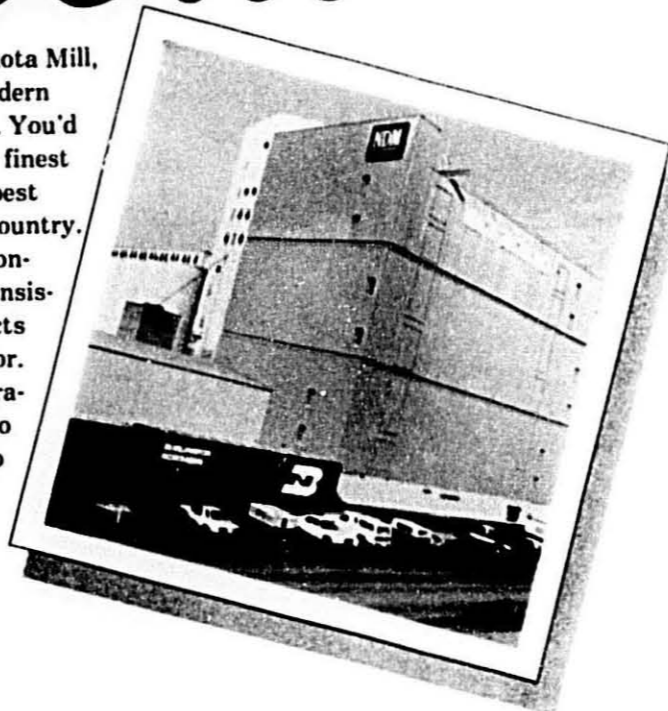
Wish you were here...

If you were at the North Dakota Mill, you'd see one of the most modern milling facilities in the world. You'd see the latest equipment, the finest mill facilities, and one of the best loadout systems in the country. You'd meet people who are concerned with producing the consistent quality of durum products that make your pasta superior. Place your order now for Durum No. 1 Semolina, Perfecto Durum Granular and Excello Durum Patent Flour.

the durum people



NORTH DAKOTA MILL
Grand Forks, North Dakota 58201



NOVEMBER, 1983

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4. Reorganize the Market

Quite innovative mature industry entries have been made through cross-licensing of potential competitors, the formation of joint ventures, and similar activities which can change a potential competitor into an eager friend. This is particularly applicable overseas when entering a market or where the company entering has limited capital. The oil, chemical, and pharmaceutical industries often provide interesting examples of this strategy in action.

To summarize what this part of the "how to do it" message has been:

- The product life cycle in a mature industry is different from that in a growth industry, and previous experience in a growth industry can be misleading.
- The Market Attainment Plan process is one way to do the special implementation planning necessary to recognize the unique characteristics of a mature industry.
- There are ways to enter a mature industry through the use of non-traditional strategies, such as acquire and rationalize, that can provide almost immediate cash flow while removing a competitor from the scene.
- If you own or manage a business in a mature industry, and the company is also what Wall Street calls a "loaded laggard," the 1980s will be a time of intense pressure either to use you assets properly or to be acquired and rationalized. You may be the easiest way for a company to get into a mature market segment it has been eyeing. We suggest you do it to them before they do it to you.

Americans Currently Taking Vitamins

- 37% of the general adult population, or nearly 60 million adults, took vitamins in 1982. Of these, most (85%) took them on a regular basis (every day or almost every day).
- 41% of women with children regularly give vitamins to one or more of their children.
- Among children, vitamin usage is most common among youngsters aged under 12 and decreases sharp-

ly among teenagers (37% of children under age 3, 47% of children aged 3 to 5 years; 36% of children aged 6 to 12 years; 30% of teenagers).

- 58% of adult multivitamin users take a product containing minerals and/or iron. (1)
- 83% of the vitamin C supplements purchased in 1981 contained 500 mg of less. (2)
- 89% of vitamin E supplements purchased in 1981 contained 400 IU or less. (2)

Vitamin User Demographics

Adults who take vitamin supplements tend more often to be:

- female (42%) than male (31%)
- college graduates (46%) than high school (39%) or grade school (27%)
- in clerical/sales (45%) or professional/business (43%) occupations than manual workers (33%) or not in the labor force (35%)
- in households with annual incomes of \$10,000+ (39%) than with lower incomes (31%)
- without children living at home (38%) than with children (35%)
- residents of the West (45%) than anywhere else in the country.

VITAMIN USER PSYCHOGRAPHICS

Characteristic	% of Vitamin Users
Do not smoke	39%
Do smoke	33%
Are on a diet	50%
Are not on a diet	34%
Exercise frequently	44%
Exercise infrequently or not at all	33%
Are under a lot or some stress	41%
Are under little or no stress	32%
Often read magazines and newspapers	41%
Seldom read magazines and newspapers	28%

References

- (1) The Gallup Study of Vitamin Use in the United States, Survey VI, Volume 1, The Gallup Organization, Princeton, NJ, 1982.
- (2) MRCA Special Study, Market Research Corporation of America, Northbrook, IL, 1981.

Consumption Trends Support Changes in Eating Habit

In recent studies, Americans say they are more health and diet-conscious than they have been in the past. This is particularly true of upper income consumers who tend to eat away from home more frequently than those with lower incomes.

Here is a look at long-term per capita food consumption trends which are indicative of how Americans are changing their diets. Some of these consumption trends tend to support rising interests in diet and health while others do not. For instance, the accompanying table shows that poultry and fish lead consumption increases but that sugar, fats and oils also have risen.

Changes in per capita food consumption, 1967-81

Increase in consumption	Percent change 1981/1967
Poultry	+38%
Fish	+21
Sugar and sweeteners	+16
Potatoes	+15
Fats and oils	+12
Fruits	+11
Vegetables	+4
Flour and cereal products	+4
Decreases in consumption	
Coffee, tea and cocoa	-19%
Eggs	-17
Beans, peas and nuts	-7
Dairy products	-2
Meat	-2

Source: Per Capita Food Consumption Index, USDA.

Chicken and turkey consumption has been soaring since 1976. Pork consumption also has risen while decreases have occurred for beef, veal and lamb. Per capita fish consumption has risen by more than 20 percent since 1967. Fresh and frozen fish consumption has risen from 3.6 pounds in 1967 to 5 pounds in 1981, while shellfish rose from 2.2 pounds to 2.8 pounds.

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WHAT VITAMINS DO PEOPLE MOST COMMONLY TAKE

Supplement	% of Adult Users	% of Men	% of Females
Multivitamins	68	65	72
Vitamin C	32	32	33
B Vitamins	27	20	32
Vitamin E	20	23	18
Minerals	19	13	24
Vitamin A or D	8	not asked	not asked

THE MACARONI JOURNAL

PUT
PEP
IN YOUR
PASTA

The Italian Contribution — V. La Rosa and Sons

When the Italians came to America at the turn of the century they came in large numbers and settled for the most part on the eastern seaboard. There were colonies in all of the major cities, of course, and some section such as North Beach in San Francisco, Taylor and Halstead Streets in Chicago, Italian Hill in St. Louis were known for their ethnic background. Omaha, for example, had a large contingent of Italians who remained there after work on the railroad was completed following the Civil War, and most of them went into the grocery or restaurant business and naturally served pasta.

Henry C. Putnam, executive secretary, Northwest Crop Improvement Association, Minneapolis, is quoted by Giuseppe Prezzolini in his book "Spaghetti Dinner" as stating: "The macaroni industry became permanently established after World War I. It was a minor industry prior to that when citizens were just beginning to realize that macaroni products were a desirable and wholesome food."

In 1915, when Italy joined the Allies, importation of macaroni products ceased abruptly. Imports dropped from a high of 160 million pounds to practically nothing, and immediately there was created an enormous demand for domestic product.

After the war, this new American industry wished to protect itself against the possible resurgence of Italian competition. It asked for and obtained a tariff. The industry was at that time mainly in Italian-American hands, but commerce was no respecter of nationalities. As people of other national origins joined in the manufacture of macaroni, the industry became more definitely American. One Italian-American manufacturer, Joseph J. Cuneo, of La Primiata Macaroni Company of Connellsville, Pennsylvania, who was working in the industry at the time, recalls that before the First World War all the correspondence dealing with the macaroni industry was carried on in Italian; ten years later it had changed over completely to English. One example of the change in semantics was the government's taking of the term "Pasta Alimentaire" and angli-

cizing it to "Alimentary Paste." This sounded like wallpaper adhesive to the pasta manufacturers, and they asked that the government call these foods "Macaroni Products."

The battle to eliminate the term "paste" went on for years.

Americanization of Industry

The Americanization of the industry was accompanied by a distinct industrial change. In the early days spaghetti making took place, for the most part, in one big, poorly lighted room containing the three machines necessary to manufacture pasta: a mixer; a blender; a press. The machines in those days were usually manned by members of one family who sold their product principally to other Italian-American families, generally from the same little section of Italy as the spaghetti makers in a neighborhood market.

When the thriving industry began producing for the growing mass market, it entered the machine age of mass production. The American industrial system moved in to put spaghetti on the assembly line. There were machines to roll out dough, knead it, press and cut it, pack spaghetti into cardboard boxes, and later wrap these in cellophane or drop them in bags. These packages were shipped to distant stores by truck and train. Modern inventions made the factories cleaner,



Peter LaRosa

healthier. They also made it possible to guarantee a uniform, high quality product.

LaRosa Founded in 1914

V. LaRosa & Sons was one of the most successful Italian-American producers. The company was founded in 1914 by Vincenzo LaRosa and has five sons, Frank, Stephano, Pasquale, Filippo, and Peter. All learned the fundamentals of the business, but Peter was the outside man who specialized in advertising and selling.

The business began as an adjunct to the family's Italian specialty grocery store in Brooklyn and largely served the many Italian-Americans who lived in the neighborhood.

During the 1930's company products were being marketed throughout the entire metropolitan area of New York. A completely integrated line of packaging machinery and wholesale distribution—innovations for the industry at that time—were set up.

In conjunction with the first advertising campaign, the company inaugurated the idea of a brand name in the Italian food business and selected a red rose as its trademark. Early advertising campaigns relied heavily on foreign radio stations in New York City to reach the greatest concentration of LaRosa customers. In the late 1940's, the firm expanded its coverage to general audience radio stations in key markets where they had distribution. Newspaper and car card advertising supported the radio commercial.

Italian Opera

It was really their Italian opera programs that made the name in metropolitan New York and sent them to the number one position overtaking the mighty Mueller. Fred Mueller conceded that he couldn't sell his product to the Italian market if he had gold watches in the packages, because he had the wrong name on the box, so LaRosa got the reputation of being the best Italian-American brand.

They were pioneers in television advertising and during the 1950's and early 60's products were added to the line, and the company continued to

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From left to right: Mr. Salvatore Di Cecco, Mrs. Laura Ricciorelli, Mr. Mario Ricciorelli, Mr. Aldo Ricciorelli, Mrs. Mirco Di Cecco, Mr. Alessandro Di Cecco.

V. LaRosa & Sons

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grow from their original location across the street from the Brooklyn Navy Yard in Brooklyn, New York, to a new plant in Danielson, Connecticut, and another in Hatboro, a suburb of Philadelphia. They made acquisitions of LaPrimiata Macaroni Company in Connellsville, Pennsylvania, Tharinger in Milwaukee, and Russo in Chicago. By this time two of the founder's sons had died. Frank and Pasquale; Stephano had moved up to become chairman of the board, with Peter as vice chairman, and Filippo as chairman of the executive committee, and third generation members of the family now took executive posts. Serving as president was Vincent S. LaRosa. Other officers were Vincent P. LaRosa, executive vice president and director of marketing; Vincent F. LaRosa, senior vice president and director of sales; Joseph S. LaRosa, senior vice president and director of purchases and treasurer; Phillip P. LaRosa, senior vice president and director of operations and secretary. Sons-in-law John J. Cuneo served as vice president and general sales manager and James G. Tallon as vice president and general advertising and merchandising manager. The scuttlebutt in the trade was that each cousin would get a plant. This didn't work out, and it became obvious in short order that none of the cousins wanted to leave metropolitan New York, although Phillip went to Danielson and Vincent P. went to Hatboro.

Part of the Italian culture calls for the oldest son in the family to have the same first name as his grandfather. Also, the oldest son is the heir and head man when the father dies, regardless of what his particular talents might be. In most family organizations there is always an inside man to handle production and administration and an outside man to handle sales and public relations.



Vincent S. LaRosa Joseph S. LaRosa

NMMA President Peter LaRosa

Peter LaRosa was the 42nd president of the National Macaroni Manufacturers Association serving a term from 1954-56. He was elected at the Annual Meeting celebrating the golden anniversary of the Association.

King Midas Flour Mills, a part of Peavy, advertised some highlights of the 50 years between 1904 and 1954.

1904—some of you will remember the National Macaroni Manufacturers Association was founded. Lillian Russell, Gibson Girl—a plush age.

1912—King Midas Flour Mills mill their first barrel of semolina at the Dakota Mill in Minneapolis.

1914—imperial yearning for power is balanced with alliance and counter-alliance. War inflames the civilized world.

1919—War ended. First issue of the Macaroni Journal off the press under M. J. Donna. Al Jolson, Babe Ruth, and flappers.

1929—Wall Street crash. Depression grips world. Bank holiday. N.R.A., C.C.C., W.P.A., P.W.A. etc., alphabet soup on every tongue.

1939—King Midas Flour Mills first semolina in September in its newly acquired Dacey Mill in Superior

1940-45—Turbulent years. Hitler, panzers, blitzkrieg. Dunkirk, Coventry, Pearl Harbor became symbols. World War II. Peace in 1945.

1946-53—Unrest seems normal. Strikes and wage-price spiral up. Communism abroad, aid to Greece, Berlin airlift, Korea. United Nations. Peace 1953.

A problem facing the industry at that time was the devastation of the durum crop by a stem rust called 15B. Appearing first in 1950, North Dakota took the heaviest losses from the new scourge that affected 15 states from Pennsylvania to Idaho and from Texas to Canada. The parasite that attacked the stems and leaves of wheat and other cereal grains led a double life, one

stage occurring on the grain stem and the second on the winter-harbor on the barberry bush.

The Rust Prevention Association with Donald G. Fletcher as executive director, headquartered in Minneapolis, worked on the problem of rust control and barberry eradication for many years. The National Macaroni Manufacturers Association supported the effort when the scourge afflicted the durum crop for four successive years.

During that time plant breeding, which was a new science, was encouraged to find strains of wheat resistant to this new disease and supported by growers, millers, and pasta manufacturers, the agronomists and cereal technologists at North Dakota State University embarked on a crash program to develop new strains.

During the shortage the industry was forced to go to blends of bread wheat to supplement the scarce durum. Consumption of pasta during this time fell and indicated clearly that durum was the standard of quality.

As usual, when quality raw material is in short supply and the price is high, imports of foreign products poured into the market. In 1951, 981,000 pounds of pasta were imported, and this jumped to 2,749,000 pounds in 1952. By 1954 the total was 4,639,114 pounds.

Delegations of growers, millers, and macaroni manufacturers went to Washington to tell representatives in Congress that the durum shortage was only hurting all segments of the industry, but was adding to the wheat surplus problem that the country had in other varieties of wheat.

Kick in the Pants

By the fall of 1955 durum production was up and prices were falling. Through Dick Forkner, business manager of the North Dakota State Durum Show and editor of the Cavalier Co.

(Continued on page 38)



Phillip P. LaRosa Vincent F. LaRosa Vincent P. LaRosa

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(Continued from page 36)

Republican newspaper, the farmers lodged a protest that they were being given a kick in the pants.

In February, 1956, the "mail bag" column of the Bottineau Courant, a weekly newspaper in Cando, North Dakota, had carried a letter written by George Roulkes, as an open letter to Senators Young and Langer. Under the heading "Durum Swindle" Mr. Foulkes implied that the farmers had been sold down the river and he called for honest labeling requiring 100 percent durum in all pasta products.

President LaRosa responded by pointing out that the industry could not immediately turn back to 100 percent durum even if it wanted to, as it took time to go through the pipelines of distribution. But, he pointed out, the macaroni industry's interest in durum over the years has been proven by its consistent financial support of research and development to provide better strains of durum wheat; its financial aid and cooperation in the rust prevention programs; its continuous and incessant advertising and publicity of macaroni; its historical consumption over the years of virtually all the durum produced.

Later the Department of Agriculture announced a program to encourage increased production of durum flour by allowing those who had an historical record in one or more of the past five years to plant three acres of durum for each acre of the farm wheat allotment not planted to "other wheats." The two-for-one program in 1956 pleased the growers.

High Protein

On September 30, 1954, the U.S. District Court for the District of Delaware granted a judgment in favor of the government in a long-pending case of the United States v. 20 Cases, Buitoni 20 percent protein spaghetti.

The government charged that the food was misbranded since it purported to be and was represented as a macaroni product and failed to meet the definition for standard of identity for that food by the regulations. Buitoni contended in the case that its product was not represented as, and in fact, was not a macaroni product. Judge Paul Leahy in a lengthy opinion concluded that the product "is a spaghetti which does not conform to the standards of

identity." After the case had languished in court for some seven years, the National Macaroni Manufacturers Association filed a brief supporting its position that the integrity of the standards should be upheld. The opinion sustained the Association's position that the words "macaroni, spaghetti, vermicelli, etc." cannot be used in conjunction with any unstandardized product.

When seizing the food, the government charged that "gum gluten" had been added to the spaghetti so that the protein content exceeded 13 percent by weight as specified in the Standards of Identity. Buitoni contended their product had a distinct separate identity of its own and that by adding gluten to bring the protein content up to 20 percent was merely restoring what it had lost over the years in increased wheat production which lowered the protein.

After showing that the manufacture, drying and preparation of the product was the same as spaghetti and that it was eaten with cheese and sauce from Buitoni's Spaghetti Bar in New York City, the government concluded that "the provisions for standards of identity thus reflect the recognition by Congress of the inability of consumers in some cases to determine solely on the basis of informative labeling, the relative merits of a variety of products superficially resembling each other."

Two important lessons were learned in this case. First, that the industry would protect the Standards of Identity for its products by going to court, if necessary, after a decade and a half had passed after their adoption. Secondly, professional legal talent was employed to carry the Association's suit as "amicus curiae" which in legal parlance means a friend of the court. Counselors Joe Giordanno of V. LaRosa and Sons, Inc. and Roger di Pasca of Ronzoni Macaroni Company had spearheaded the drive to head off a race of protein percentages that had faced the industry.

Phony-Roni

In the fall of 1969 some 3,000 persons attended a White House Conference on Food, Nutrition, and Health organized by Dr. Jean Mayer, nutrition expert from Harvard University, who found fault with the rigid requirements of recipe standards such as those for pasta.

Among the 26 expert panels who were established to deal with the various subjects and discussions was one headed by C. W. "Tex" Cook, Chairman and Chief Executive Officer of General Foods Corporation on Food Manufacturing and Processing. He picked up Dr. Mayer's challenge on Food Fortification and came out with a corn-meal 60% soy-flour 30% and wheat-flour 10% hard macaroni—later called "Golden Elbow"—for which he got a marketing permit from the Food and Drug Administration.

On May 21, 1971 President Vincent F. LaRosa sent the following letter to the hearing clerk, Department of Health, Education and Welfare, on behalf of the National Macaroni Manufacturers Association: "The National Macaroni Manufacturers Association, representing macaroni manufacturers in the United States and Canada who produce virtually all the macaroni sold and consumed in the United States, is unequivocally opposed to the proposed rule-making announced in the Federal Register of March 3, 1971, which would establish a new standard of identity of (21 C.F.R. part 16) for 'enriched macaroni products with improved protein quality'.

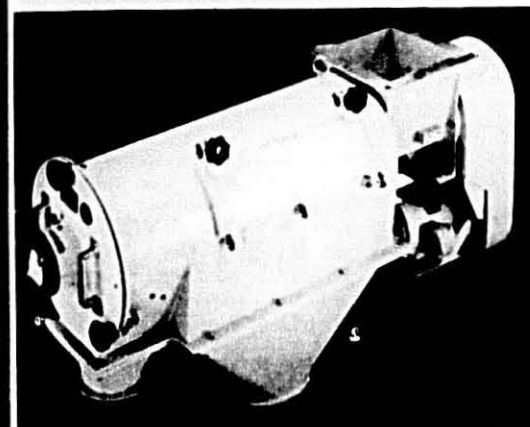
"Opposition is based on several considerations in two areas. The first relates to the violence which the proposal does to the entire fabric of standards of identity. The second is based on the deception which the proposal would foster as to macaroni products and to the disrupting and destructive effect which it would have on the macaroni industry and on processors and millers of durum wheat."

Citing issues that were discussed by Congress when it adopted Section 401 of the Food, Drug, and Cosmetic Act, which authorizes the promulgation of definitions of standards of identity, the following questions were asked: "Is the new standard necessary 'for purposes of safeguarding the public health' or 'preventing deceit upon the purchasing public?' "Will it effectively prevent chiseling operations of the small minority of manufacturers?" "Is it necessary so that 'the integrity of food products can be effectively maintained?' "The answer to all of these Congressional tests must be "no."

It took a lot of meetings in the industry and with government officials; it took a lot of publicity which culmi-

(Continued on page 40)

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nated in a quotation from the proprietor of the Cantina de Italia, famous Washington, D.C. restaurant, "Corn meal is for feeding chickens, not people."

There was the rub. Golden elbows tasted like corn meal mush, and the product didn't sell, so it died an economic death although it was promoted politically. School kids just didn't like it. Once again the standards of identity had been preserved.

Vincent's Administration

Vincent LaRosa's administration as president was notable for events other than phony-roni. The National Macaroni Institute was granted the privilege of having a cocktail party for the food editors meeting in San Francisco in the fall of 1970. Pasta as finger food and hors d'oeuvres garnered headlines on food pages around the country.

The Press Party in New York in mid-September assumed a reputation of soft sell and of being a family reunion of the pasta makers with the New York press corps. Each year it preceded the Washington Meeting which had also become an established event being held the following day in Washington, D.C., with meetings with people in government from the Department of Agriculture, Food & Drug Administration, Federal Trade Commission, and other agencies as well as Senators and Congressmen. The climax of the day was an evening reception, the first of which was held on the roof garden of the Washington Hotel overlooking the White House. Later it became a practice to have a morning briefing session at the U.S. Chamber of Commerce before going up to the Hill for luncheon in the Rayburn House Office Building. Pasta people had discovered that it paid to have friends in Washington.

Another unique experience of this administration was the Winter Meeting at San Juan, Puerto Rico, where the LaRoses did business. While the Convention was held at the Americana, contacts were made with the Bankers Club, and the Mayor of San Juan spoke to the group.

A Macaroni School was held in Switzerland as a part of a European tour of northern Italy including the IPACK-IMA Fair at Milan and visiting pasta plants there and in Switzerland. Some



Vincent F. LaRosa

38 industry members participated in this educational jaunt.

Consumption Trends

(Continued from page 32)

Overall dairy consumption has declined only slightly since 1967, although consumption of low-fat milk, yogurt and cheese has increased, and consumption of whole milk, cream and canned milk has declined.

Per capita egg consumption declined 17 percent between 1967 and 1981.

Consumption of fat and oil products rose 12 percent in 14 years. However, the share coming from animal fats declined from 32 percent in 1967 to 19 percent in 1981. This change reflects the substitution of margarine for butter and the substitution of vegetable oils, particularly soybean, for lard in shortening manufacture as well as increased use of salad and cooking oils.

Fruit consumption is up because of increases in fresh non-citrus fruit and fruit juices. Increased consumption of fresh bananas, pears, pineapples, plums, prunes and strawberries are particularly notable. Per capita juice consumption, particularly for frozen citrus, is also up substantially.

Fresh vegetable consumption has risen steadily since 1971, but total processed vegetable consumption has been flat. Improvements in handling and cold storage of fresh items have led to year-round availability. Salad ingredients, such as lettuce, cucumbers, have registered gains as have broccoli, cauliflower, spinach and garlic. Among processed vegetables, consumption of canned products has declined while

consumption of frozen products has increased.

Overall potato consumption is up with much of the increase coming from the frozen varieties.

Flour and cereal products consumption declined slightly in the early 1970's. More recently, consumption has been rising due to an upturn for rice and wheat flour.

Per capita consumption of sugar rose 16 percent from 1967 to 1981. Although cane and beet sugar use declined, this was more than offset by increased use of corn sweeteners. Rising soft drink consumption, up 80 percent, explains much of the increase for sugar and sweeteners.

Metric Guide

The conversion of packaged food and grocery products to metric units of weight and volume should avoid the appearance of deception and be consistent with government or industry standards as well as industrial capability.

These are some of the suggestions for metric packaging of food and grocery products as outlined in a 16-page guide prepared by the American National Metric Council (ANMC) Food and Grocery Products Coordinating Group.

Besides reviewing metric packaging requirements, the guide represents a step toward seeing whether there can be a consensus on universal metric dimensions, product line by product line. The guide also recommends that packagers consider the relationship of package size and configuration to current storage, measuring, processing and cooking equipment.

Metric units, along with the required inch-pound units of measurement, may be printed on the principal display panel of the package, as long as they are accurate.

The ANMC guide also introduces metric packaging guidelines for packaged products that are suitable for soft conversion, rounding or whole unit metric conversion.

The American National Metric Council is a private, nonprofit organization that serves its subscribers in metric transition matters, including industry-wide planning, coordination, information and government relations.

The Food and Grocery Products Coordinating Group is chaired by George Carleton of Procter & Gamble.

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Con Agra Flour Milling Company of Omaha, Nebraska has mailed out a pasta information kit to food editors of the top 500 newspapers in America. The theme: "World's Best Pasta - Made in USA."

They have also sent the same kit to hundreds of highly placed grocery officials.

The kit sings the praises of pasta as one of our most perfect foods. Included are articles that collectively prove pasta is one of the most nutritious, delicious, versatile, economical and low-calorie foods anyone can buy.

Beyond that, the kit brings the food editors up-to-date on the unfair pasta subsidies. And it explodes the myth that Italian pasta is somehow superior or more authentic. It should do a job.

American Cuisine Leaflet

"Pasta Goes American" titles a new leaflet from the National Pasta Association. The content combines American-made dry pasta with other of our native foods showing varied uses of pasta in the emerging American cuisine.

Consumers are reminded that pasta is a healthy food which is not fattening. Each recipe is calorie-counted. All are 400 or less calories per portion.

Send 50¢ for single copies to the Macaroni Journal, Box 1008, Palatine, IL 60078. Quantities: \$15 per hundred; \$90 per thousand, f.o.b. Palatine.

Leaflets — 15¢ each plus 25¢ postage and handling; \$12 per hundred plus freight.

"Nutritive Values of Macaroni Spaghetti, and Egg Noodle Products". "Pasta Primer"—basic background piece.

"Eat Light with Pasta". "Pasta in a Slim Cuisine". "Macaroni Is No. 1". "One-Pot Pasta Suppers from the Freezer". "Entertaining with Pasta".

"Unimac Cookery"—pasta quickies for singles and doubles. "Pasta . . . Food for Athletes".

Prince-Paramount

The Prince Company of Lowell, Massachusetts, has announced the merging of operations of Prince Foods, New York Division and Paramount Macaroni.

The new offices for Prince-Paramount are located at 303 Marcus Boulevard, Deer Park, N.Y. 11729. Sal Cardinale is with Prince Foods, New York Division; Louis J. Coniglio with Paramount Macaroni Company, Inc.

Spaghetti Sauce Battle

The marketing battle between Chesebrough-Ponds and Campbell Soup over spaghetti sauce is escalating. After fighting to protect its dominant share of the \$675 million market against Campbell's two-year-old Prego, Chesebrough is going on the offensive. It has a new Ragu Chunky Gardenstyle sauce it hopes will convert cooks who still make their own spaghetti sauce.

These people account for 45% of all spaghetti-sauce users; nearly all of them add their own vegetables. The new Ragu product differs from other sauces because its three varieties have either mushrooms and onions, green peppers and mushrooms, or extra tomato with garlic and onion.

That might not seem like much of a difference, but Chesebrough figures that, within a year, Gardenstyle will have retail sales of \$100 million and that more than half of the sales will come from new customers. It hopes to add a few market share points to the 52% share Ragu already holds as the entire spaghetti-sauce market expands. Chesebrough has budgeted \$40 million for advertising and promotion for Gardenstyle and is telling grocers they should drop competing brands that don't spend as much.

Campbell Soup, whose Prego now sells about 25% of the market, says it hasn't any plans for a similar entry. "For us to copy their product wouldn't be innovative," says Herbert Baum, vice president for marketing. Campbell adds that it's about to open a third plant to keep up with demand for Prego.

Acting FDA Head

Mark Novitch, deputy commissioner of the Food and Drug Administration, has been named acting director of the agency during the search to replace Commissioner Arthur Hull Hayes.

Hayes said in late July that he had accepted the position of provost at New York Medical College. Novitch served a prior stint as acting commissioner before Hayes was appointed by the Reagan Administration in April 1981.

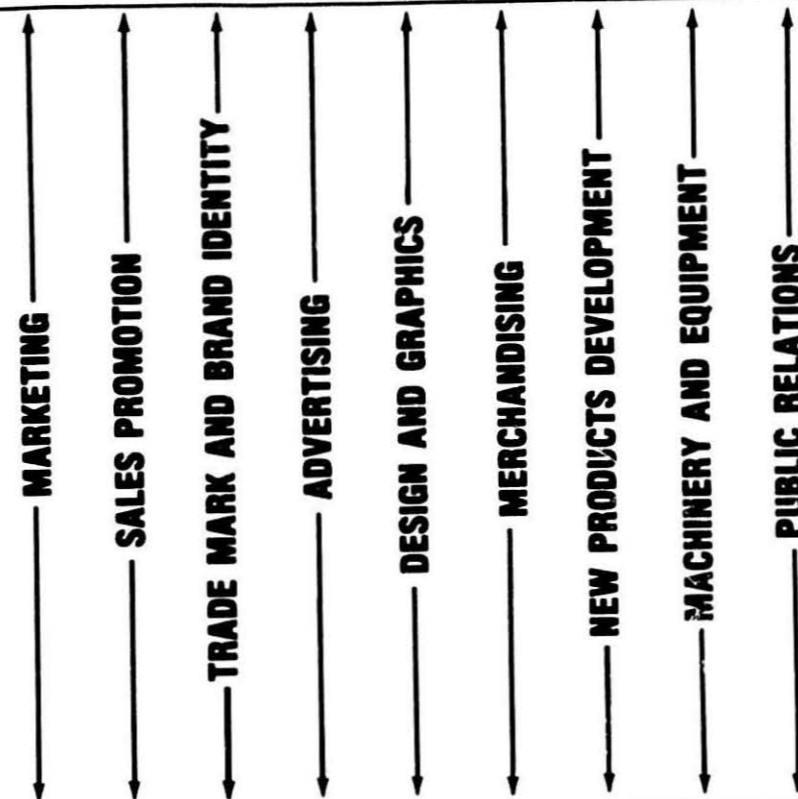
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