

**THE  
MACARONI  
JOURNAL**

**Volume 56  
No. 9**

**January, 1975**

JANUARY, 1975

# Journal



## CONVENTION HEADLINERS

### WINTER MEETING

National Macaroni  
Manufacturers  
Association

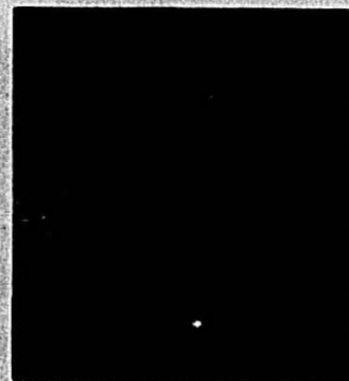
Doral Country Club  
Miami, Florida

January 29—Movie Premiere  
"Nutrition by the Numbers"

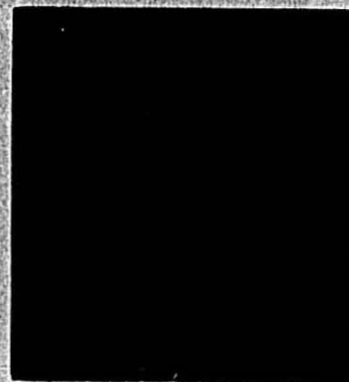
January 30—State of the Industry  
Product Promotion  
New Developments at FDA—Dr.  
Robert W. Harkins, Director,  
Scientific Affairs, Grocery  
Mfrs. of America.

January 31—Grocers' Panel:  
Selling in Today's Economy, In-  
cluding Mr. Guy Hudon, presi-  
dent and general manager,  
Hudon et Orsali, Montreal.

February 1—Planning for Perform-  
and Profits: discussions on  
forecasting, setting priorities,  
budgeting, establishing objec-  
tives, guiding managers.  
Saluting . . . **Will S. Dede**,  
President, San Giorgio Macaroni,  
Lebanon, Pa.



Dr. Robert W. Harkins



Mr. Guy Hudon



Mr. Will S. Dede

# The Macaroni Journal

January  
1975  
Vol. 56  
No. 9

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139 North Ashland Avenue, Palatine, Illinois. Address all correspondence  
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JANUARY, 1975

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## Industrial Outlook

Projections of the "Industrial Outlook" by the U.S. Department of Commerce for both 1975 and through 1980 points to gains in value of shipments by milling, baking and pasta industries.

The projection for bread and other bakery products, except cookies and crackers, is a 3% gain. Cookies and crackers are expected to gain 6% in 1975. Flour and other grain mill products are projected at 10% increase.

The sharpest increase projected is for pasta products. The pasta industry enjoyed a 25% increase in value of shipments in 1974 over 1973, and is expected to post a 15% gain in 1975. It will likely grow at an annual compound rate of growth of 9.2% in the 1974-80 period.

We are glad to hear such optimistic

projections, but as Cassandra we would caution it might not be. Why? Because in the year of 1974 there was wide substitution of wheats other than durum and history shows that pasta consumption generally rises or falls with the availability of durum. Durum priced itself out of the market when it went to \$9. Even when it went back to \$7 it was \$2 higher than hard red winter.

Department of Commerce predictions a year ago that more durum would be exported than produced in the 1973 crop started the blending. High prices encouraged it.

Lower meat prices, plentiful potatoes, rice and beans made competition rough in the last half of 1974. Pasta sales were soft compared to the previous year. They can firm up quickly if durum is sold on a more competitive basis.

**WINTER MEETING**  
**NATIONAL MACARONI MANUFACTURERS ASSOCIATION**  
**DORAL COUNTRY CLUB AND HOTEL**  
**4400 N. W. 87th Avenue, Miami, Florida**

**January 29 — Wednesday**

- 11:00 p.m. Convention Registration desk open in Executive Lodge.
- 2:00 p.m. Board of Directors Meet, Conference Room, A Lodge.
- 7:00 p.m. Welcoming Reception and Cocktail Party, Poolside.  
**MOVIE PREMIERE:**  
 "Nutrition by the Numbers".  
 Business Sessions in the Andorra Room Executive Lounge.

**January 30 — Thursday**

- 9:00 a.m. Business Session — "State of the Industry", by President Nicholas A. Rossi.
- 9:15 a.m. Product Promotion Plans: Ted Sills and Elinor Ehrman.
- 10:00 a.m. Washington Report: Harold T. Halfpenny.
- 10:30 a.m. New Developments at FDA: Dr. Robert W. Harkins, Director of Scientific Affairs, Grocery Manufacturers of America.
- 11:30 a.m. Durum Industry Advisory Committee Concerns: Alvin Kenner.
- 12:00 noon Adjournment.
- 1:00 p.m. Tennis Round-Robin — sign up at Convention Desk.
- 7:00 p.m. Suppliers' Social — Hall of Conquerors, Lobby Level, Clubhouse.
- 8:00 p.m. Italian Dinner Party — Ballroom.

**January 31 — Friday**

- 9:00 a.m. Business Session — "Selling in Today's Economy". Moderator: Lester R. Thurston, Jr., President, C. F. Mueller Co.  
 Panelists: Guy Hudon, Hudon et Orsali, president, IGA Franchise, Montreal. Sheldon B. Sosna, VP Marketing, Pantry Pride Stores, Philadelphia. Steven P. Horowitz, Grocery Buyer, Wakefern Food Corp., Elizabeth, N.J. Panelists will discuss changing food patterns, distributor's concerns, manufacturer's concerns, consumer considerations.

After brief statements from the panelists and discussion of these topics from them, we will separate into small discussion groups with each panelist acting as the focal point for questions and answers.

- 12:00 noon Adjournment.
- 1:00 p.m. Golf Tournament — White Course — Sign up at Convention Desk.
- 7:00 p.m. Suppliers' Social — Lobby Lounge — Clubhouse.  
 NO planned dinner function.

**February 1 — Saturday**

- 9:00 a.m. Planning For Performance and Profits: Presentation to be made by and discussions led by Henry J. Guerrisi, Vice President and Treasurer; Jerome V. Guerrisi, Vice President, Sales and Marketing, San Giorgio Macaroni, Inc.; Joseph P. Viviano, President, Delmonico Foods.
1. Forecasting — the work to be done; — the resources to perform the work.
  2. Identifying and setting the priorities.
  3. Establishing specific performance and objectives.
  4. The role of the budget in planning.
  5. Guiding managers to develop detailed plans for meeting the objectives.
- A Salute To A Professional Manager: Will S. Dade.

- 12:00 noon Adjournment.  
 Afternoon free for recreation.
- 7:00 p.m. Suppliers' Social — Hall of Conquerors, Clubhouse.
- 8:00 p.m. Dinner Dance — Ballroom.

**February 2 — Sunday**

- 9:30 a.m. Board of Directors meet, Conference Room A.  
 Adjournment by noon.



**Sell her with quality.**

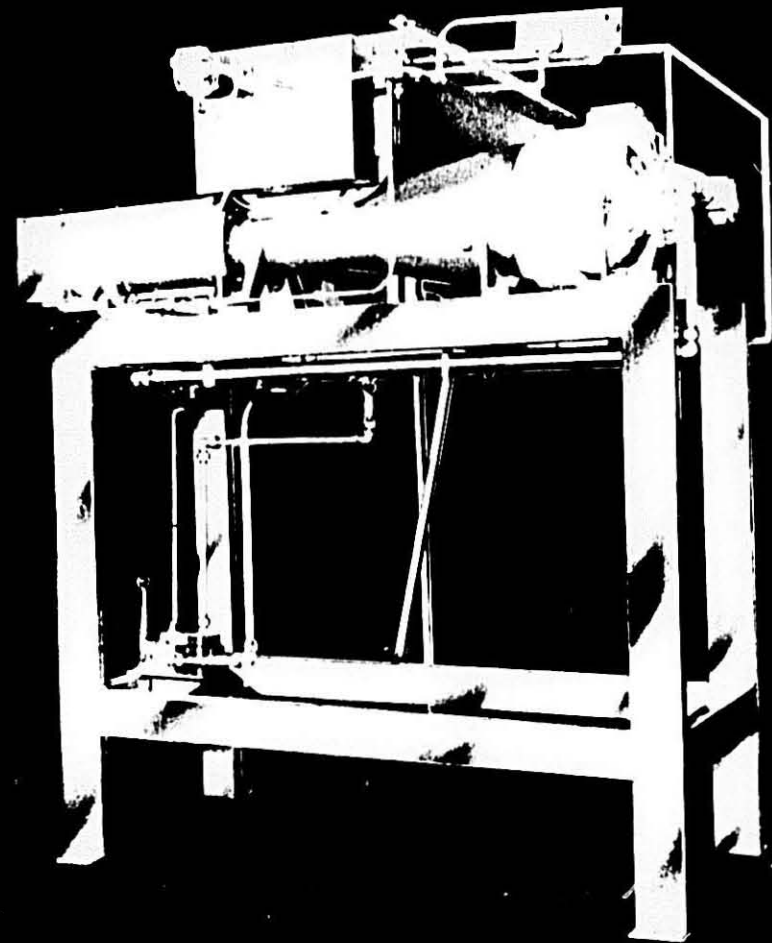
The demand for macaroni products is up. Pasta dishes are popping out of ovens all over America as housewives try to keep their food costs down. Recipes are being exchanged over coffee cups, and good cooks are looking for

quality pasta products. You'll be giving them quality if you start with durum from the North Dakota Mill. Keep your sales up with Durakota No. 1 Semolina, Perfecto Durum Granular or Excello Fancy Durum Patent Flour.

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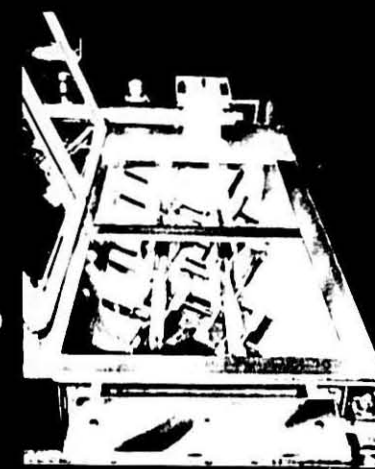
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## The Food System in the United States

Remarks by Fritz Corrigan  
President, Peavey Company - Minneapolis  
Food Editors Conference - Dallas

I am especially happy to share this platform with my associates, Catherine Clark and Bill Bokman, because of the common interest that unites all of us here this morning—you food editors who are interpreting and reporting, and we as managers of a company deeply involved in the people-feeding business.

The one thread that binds is the restless mood of the consuming public in the face of deep uncertainties.

You find yourselves increasingly writing front page news about hunger, food supplies and inflationary prices.

I assure you that what you are doing is quite helpful to people like myself who are coping with the very factors that make those headlines. Your particular kind of reporting from the base of your knowledge about food and nutrition is not only good input for our decision making, but also you are reaching an audience which we think wants and needs to know more about the U.S. food system and the world food situation.

What can I offer in just a few short minutes that will be the most help to you in your communications efforts?

### Perspective

I concluded that I should have one simple objective—to help you have as good a perspective as possible of our own U.S. food system—what it is, how it developed and why we take it so much for granted.

I could just throw Peavey Company's positions at you on such public issues as government intervention in export marketing—we are not in favor of that—or a stronger flour enrichment program—we do favor that one.

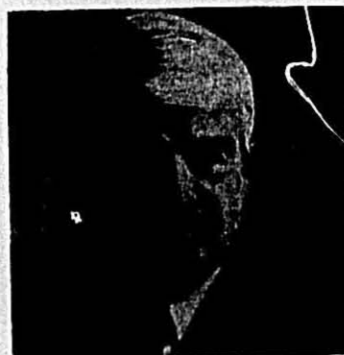
But it would probably be less of a credibility gap if I just explained the situation as I see it and let you come to your own positions on public issues affecting our food system. So let me try that.

We have a remarkably good food system in this country.

With only 2% of our people on the land, we produce one-fifth of the entire world's output of food and feed grains which in one form or another is what the human race lives on.

Our commercial farming is very capitalized—\$90,000 of capital per job compared to slightly over \$33,000 per job in manufacturing.

Our food system is a very sophisticated team effort and some 1/2 of all



Fritz Corrigan

jobs in this country are related to food agriculture.

In 1900 each farm worker supplied a little less than 7 persons with food and other products. In 1974 this has risen to about 55 persons. An interesting comparison—the present ratio in the Soviet Union is 1:5, the same as it was in the United States a century ago.

The beneficial result of this whole process is familiar on the supermarket shelves—a variety and quality of foods that no peoples anywhere ever have even come close to.

Our food system is hit by inflation just as is everything else.

### Hit By Inflation

Up until now, however, it has certainly not led the inflation. Other things have come up faster. It is a fact that over the past 20 years, food costs have risen only half as much as wages.

The latest data for 1973 indicate that we Americans spent 18.4% of disposable income for food—and that is far below any other people on earth.

Americans are not the only consumers of the food we produce. Normally, over 1/2 to 2/3 of our total wheat production goes for export.

Our food is in the news in another way these days. In calendar 1973, the \$9.3 billion contributed by our farm exports to the plus side of our international balance of payments account exactly offset the \$9.3 billion we paid out for petroleum.

This year with higher oil prices and less grain to export, it won't come out that even, but it still is extremely important.

But now we are faced with a new round of export controls as announced

recently, and while we would like to remain out of the political arena, that is where we find ourselves. Whatever one thinks as to the merit of the action taken, in the long run we must guard against clobbering this wonderful market system that we are so proud of by sending up the wrong signals to two of the most important segments of the world food complex by the imposition of these controls.

We cannot ignore inflation that is crippling our total world economy, but we must avoid making it worse by these wrong signals.

### More Food Needed

The signal should say "more food needed"—loud and clear to producers everywhere—and that language can only be interpreted in terms of price, the language of profitable production.

The other signal must say to the world "we have the capability and the desire to furnish a dependable supply within limits."

The first wrong signal to the United States commercial farmer comes at a time when he, too, faces a crisis. His sales may go up, but so do his costs—maybe twice as fast. It may surprise some people to know that he is not insulated from inflation. His net income is going to be down from a year ago.

On top of this, drought and frost have only made a tough situation worse.

Barring unwise government action, it is just possible neither side of the supply/demand complex—the producers or consumers—need have fear of the food future.

For the U.S. farmer, there must be a reasonable promise of more than just enough to keep pace with his cost of production—as we expect him to plant from fence row to fence row with the best of high quality, high cost seed, with heavy fertilizer application—he has to have some idea of his reasonable expectations. He has a right to expect his government to be predictable—and not try to reduce his prices received by imposing spur-of-the-moment controls in the middle of the ballgame.

For the foreign buyer we must afford some of the same predictability. Most of you will recall the years of surplus grain supplies when we spent considerable amounts of government money

promising to the world our capability to feed new foreign customers—cash customers like Japan and the EEC.

Sure, we were trying to cut down burdensome surpluses, but also we saw the practicalities of generating export trade—the real salvation of a free world—and at the same time improve our balance of payments.

We even granted special rail rates west to encourage the movement through the West Coast to Japan, who as a result became our first \$1 billion customer in 1970.

Then last year, on the spur of the moment, we imposed export controls on soybeans, cutting through contracts already on the books. This, of course, was harmful to our customers overseas.

These are only examples, but I hope they illustrate what I mean by "let's send up the right signals".

The position as I view it is this.

### On the Demand Side

People are being added on this earth at a rate of 80 million every year, but more important than that, is that where it is humanly possible people are upgrading their diets into more protein foods and are doing so on an increasing scale, even in the less developed nations.

This upward trend in per capita requirements is real. It is thoroughly documented and shows every sign of continuing.

Directly behind this type of market demand looms the larger question—and the genuine dilemma—of the world food situation: Can the world develop its food system fast enough to keep up with exploding populations?

One thing is for sure—there are no signs anywhere that say "less food needed".

The present 1.3 billion tons world grain output needs to go to 1.7 billion by 1985. That is an increase about equal to the present production of the United States and Russia together.

### On the Supply Side

Our U.S. food system is fully capable of greater expansion. We can be producing by 1985 a 91 billion bushel corn crop; a 2.8 billion bushel soybean crop; a 2.3 billion bushel wheat crop, according to U.S.D.A. estimates. This would be half again as much tonnage as present levels.

It will take profit incentive to bring it about.

Through the years of government programs and subsidies and large surpluses, we really camouflaged our food system and this may be the reason for

our tendency to take it for granted.

A whole generation of Americans got a very unclear picture of the true cost of food which was never as cheap as people thought it was.

Food will probably never again be as cheap as people thought it was, either, because of the rising costs of energy, labor and the other elements of the food marketing process.

If the basic economics of our magnificent food system can be thoroughly enough understood by the American people, two things ought to happen: (1) consumers will make it very clear that farm producers get the message loud and clear: "make more"; (2) producers and consumers alike will ask the government to be the one thing the market system needs most in order to do its best job. We will ask the government to "be predictable".

We must be global in our thinking and planning. We can't do it all alone and for all peoples. But we can do our share and strengthen the economy of our country in the process. And if we treat long term problems with long range solutions, I don't fear the food future. We can have reasonable prices in the supermarket and our country can still participate in this extremely important industry of helping to feed the world.

### In Closing

In closing, might I say I can't expect you to agree with all I have said—much of it is my own personal opinion—but also, some of it is part of the basic facts about the complex process that puts food on the peoples' tables.

I hope I have said something here that can be communicated to the people that you reach so effectively. It says there is more to the situation than merely lower prices in the marketplace, however desirable that might be. If you can instill global thinking in the minds of your readers with whom you have established confidence, I think our time will have been well spent.

We need a strong healthy people-feeding system in America and the world; and you, the food communicators, can do so much to give it strength and competitive health.

### Expensive Eating

Wall Street Journal,  
recently filed his report:

Food price analysts, fresh from digesting the latest crop estimates and other data, say that the U.S. appears headed for its third straight year of double-digit increases in food prices.

Next year's hikes probably will at least match this year's jump, now estimated at about 15%, the analysts say. (As measured by the Department of Labor's consumer price index, food prices rose 14.5% last year; they increased 4.3% in 1972 and by slightly less than 3% in 1971.) A few observers think that next year's food-price increase may come perilously close to the 21.5% surge posted in 1947, one of the largest on record.

This is very bad news for the wearers of WIN buttons, for it has become increasingly clear that the general inflation now raging in the U.S. can't be whipped without controlling food prices. Just a few weeks ago, a Federal Reserve Board study cited rising food prices as the major cause of inflation in the U.S. and six other industrial nations, accounting for 20% to nearly 50% of the overall price rises in those countries from mid-1973 to mid-1974.

The continuing surge in food prices also will leave a bitter taste for the nation's consumers. They have been led by this fall's flurry of economic summit meetings and food-price conferences to think that something was being done about food prices. Now, as they discover that nothing is being—and probably can't be—done, they are losing their jobs in droves.

One consumer activist warned that the continual upward push of food prices "is the seed of food riots." Boycotts against sugar have been organized in California and other states, and demonstrations against rising prices were held in numerous U.S. cities.

Even as President Ford's economic summitry was suggesting the promise for action on 1975 food prices, those prices already had been largely determined, observers say. They were determined by 15 inches of rain in parts of the Corn Belt between May 15 and June 15, washing away planted seed and delaying planting time beyond optimum-yield dates. They were determined when Iowa corn baked and withered in the July sun. And they were determined in September when still-maturing crops in the nation's breadbasket were stopped short by early frosts.

### Disappointing Crop Year

"There will be a good deal of talk by politicians, but realistically little can be done now," says Wendell Earle, marketing professor at Cornell University. "We just can't change the fact that we've had a very disappointing crop year."

The nation's crop is now estimated at 4.6 billion bushels, 18% below last year.

Continued on page 12

# TO HIGHER PROFITS---

## ECO SYSTEM

49%

PACKAGE

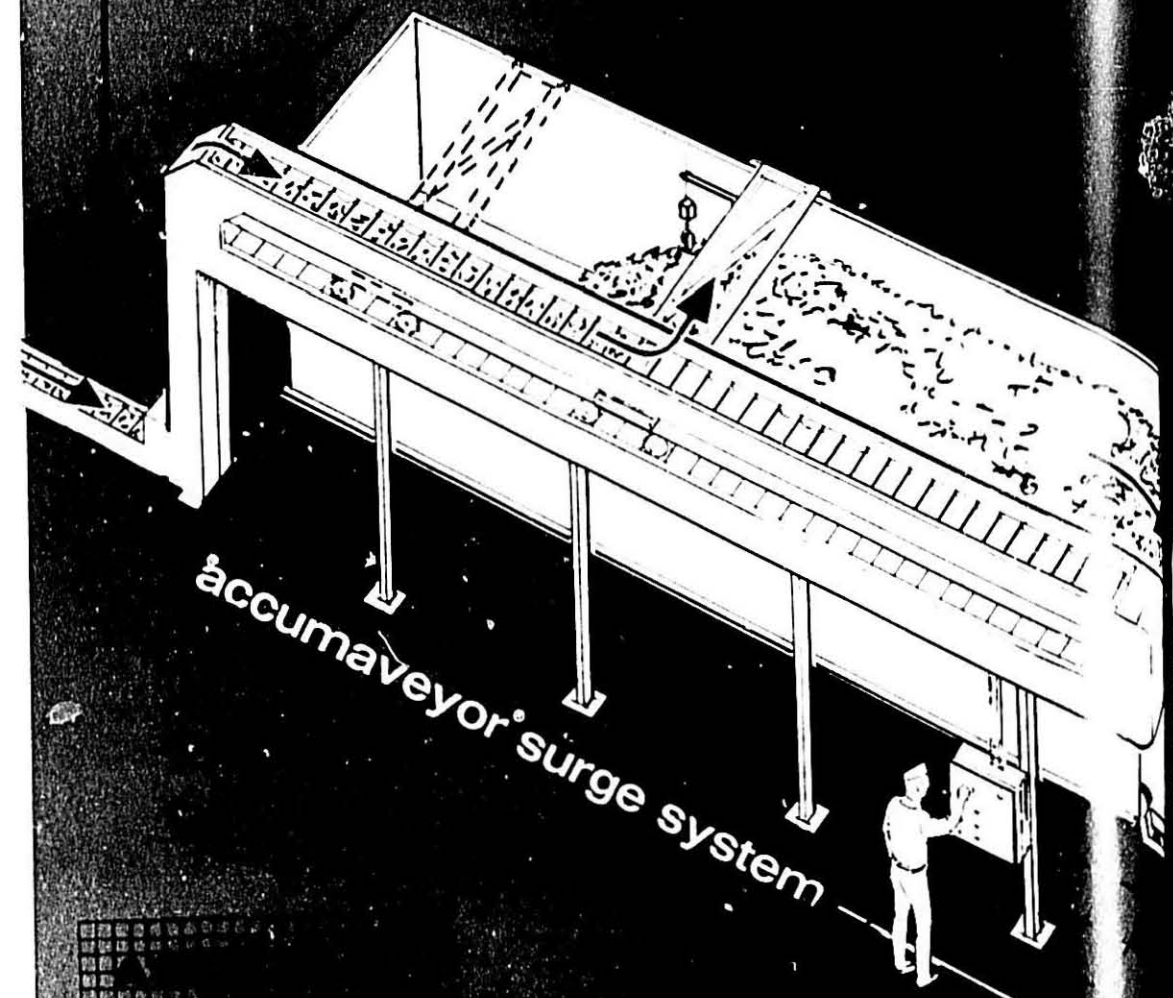
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FRANCE

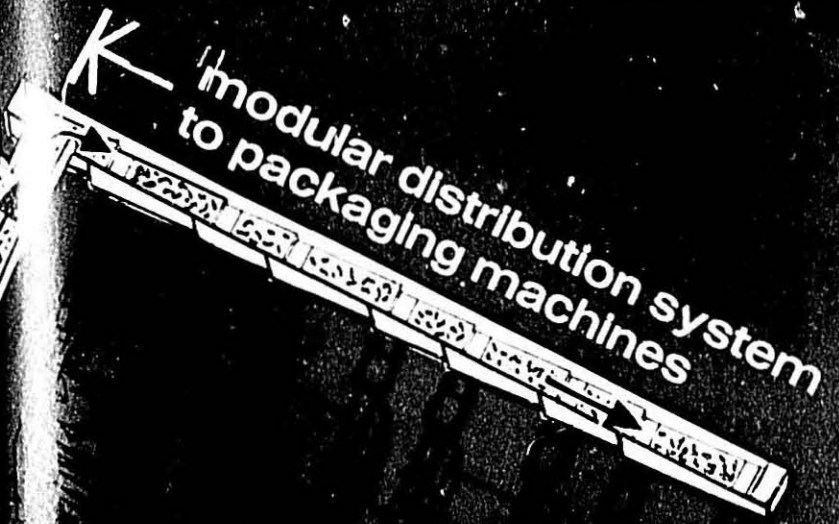
20%

12%

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modular distribution system to packaging machines

## Expensive Eating

(Continued from page 9)

year's 5.6 billion and 31% below the 6.7 billion optimistically projected by the Agriculture Department early in 1974. Corn is the key feed ingredient used in producing the protein staples of the American diet: beef, pork, poultry, eggs and dairy products. Production of sorghum, another feed grain, will be down 35% from last year and the smallest in a decade. Soybean production is 21% below last year. Soybean meal is used as animal feed, and a host of products ranging from margarine to salad dressing use soybean oil. The Agriculture Department says that overall crop production is down 8% from last year to the lowest level since 1970.

Assessing the impact of all this, plus such things as increased costs for labor, packaging and transportation, Mr. Earle predicts that food prices will rise from 12% to 15% next year over 1974 levels. "There's been some talk of maybe a five-point decline in the rate of increase, but I just don't see that happening," he says. Mr. Earle has been preparing food-price projections for 25 years.

### Forecasts

Forecasters at Wharton Econometric Forecasting Association Inc. at the University of Pennsylvania's Wharton School of Finance see food prices rising at a rate of 11% to 12% "at least through the third quarter" of 1975. David Rowe, association economist, says that raw agricultural-commodity prices will rise as much as 17%, but he thinks that the many costs of labor and materials that are added on to food prices between the farmer and consumer won't rise as rapidly. The association uses a sophisticated statistical model consisting of some 400 equations in coming up with its computerized forecasts. "Our forecasts have seemed a little high in recent years," Mr. Rowe says, "but when compared with actual results they always turn out low."

At least one forecaster thinks estimates in the 11%-12% range are low. "When I put all the pieces together, it adds up to a 15% to 20% increase in the food component of the consumer price index next year," says Walter Myers, agricultural economist at Cornell Rice & Sugar Co., a privately owned Westfield, N.J., firm that other forecasters say has compiled a good track record in forecasting.

The food price increases that these economists forecast in 1975 follow on the heels of the third straight year of attempted all-out production of key crops. Except for rice, peanuts and

cotton, "the government hasn't paid farmers to hold cropland out of crops for three years," says Clayton K. Yeutter, assistant Secretary of Agriculture. "Food prices have gone up in recent years despite our farm policy, not because of it."

Wheat production set a record this year, but it is still a smaller crop than was originally expected and wheat prices remain higher than last year. So, bakery and cereal-products prices aren't likely to come down and could shoot up if "the government lets too much wheat get out of this country" in the form of exports, Mr. Myers says.

Because farmers turned over much of their land to feed grains this year, production of canning vegetables such as peas and sweet corn is also down, and most canners are allocating products to customers. Such specialty items as white asparagus won't be found in most stores this year, industry sources say.

Packaged grocery items, many of which contain sugar, also are likely to cost more this year. Sugar itself? "I don't know, I just don't know," Mr. Myers says "Someday it's going to come down."

### Some Bumper Crops

There were some bumper crops this year. Among them: potatoes, rice, edible beans, oranges, tomatoes, onions and cabbage. There are enough turkeys on hand to assure an ample supply at least until Thanksgiving 1975 (but then they may be scarce). These items and food products made from them are the most likely candidates for lower prices.

But some critics of the food industry believe that abundant production and low farm prices no longer assure correspondingly lower retail prices. They point to retail beef prices, which they say still fail to reflect the much lower prices being received by cattlemen.

### Widening Price Gap

The alleged widening gap between farm and retail prices has made scapegoat hunting an increasingly popular game these days.

"We have a problem," Don Paarlberg, director of agricultural economics at the Agriculture Department, said at a recent conference on food productivity. He claimed that four-fifths of the 15% increase in food prices through October "were the result of increases in spreads or margins" between the farm and retail prices.

In rebuttal, Donald S. Perkins, chairman of Chicago-based Jewel Cos., told the same conference that the Agriculture Department statistics "are simply not accurate." He took the unusual step

of disclosing that Jewel food stores lost more than \$5 million before taxes and interest on \$95 million in fresh-meat sales in the first half of 1974. Mr. Perkins also contended that Jewel and other supermarkets are as much the victims as the perpetrators of higher prices. In 1972, he said, suppliers passed along to Jewel stores cost increases on 966 grocery items; in the first 10 months of this year, Mr. Perkins said, the chain incurred cost increases on 14,671 items.

### How About Prices?

Though 31% of the 1,800 supermarket customers recently surveyed by a major West Coast University stated that price was the major factor in determining where to shop, only 10% listed price as an area in which their local store could improve. This despite the fact that 77% believe food prices will be higher next year than now, while only 7% forecast a food price drop. Price is not the only factor influencing shoppers, according to the survey. A similar study taken last year found that convenient location rated first with customers, so it was deliberately left off the most recent questionnaire. Other important considerations, in order of frequency, were food selection, habit, store cleanliness, layout and the meat department.

### Food Brokers' Costs Go Up

National Food Brokers Association has surveyed food brokers' costs for the first six months of 1974 and projected estimates for the full year

	1st 6 mo.	Full 1974
Salaries	Up 11.3%	Up 12.5%
Employee Benefits (other than salaries)	Up 22.8	Up 21.9
Auto Expenses	Up 25.0	Up 23.3
Communications (telephone, telegraph, etc.)	Up 18.4	Up 17.6
Office Occupancy	Up 12.9	Up 13.6
Office Materials & Supplies	Up 16.8	Up 19.3
Gross Brokerage Collections	Up 15.0	Up 14.7

### A Lot of Wheat

India, Russia and China have made commitments to buy some three million tons of wheat from the United States in the coming year—and likely will buy substantial quantities above that.

## Maintenance Service

Preventive maintenance on Dies resolves itself into both quality and quantity control of products. For improved quality we strive to control obvious flaws in appearance such as dough rings, roughness, splits, breakage, collapsing, color, uneven wall thickness, raggedness, and shape. For increased and continuing production we strive to control hidden difficulties which may be encountered in drying, packaging and handling.

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## Customer Gets Better Receipt with UPC

Customers are carrying away something new in their shopping bags when they purchase groceries at the Piggly Wiggly supermarket at 6732 Camp Bowie Boulevard, Fort Worth, Texas.

It's a more descriptive and informative receipt which lists the name—like green beans—as well as the price of most purchases.

### More Detailed Record

The more detailed record of purchases is made possible by the installation of IBM's 3660 supermarket system that has a scanner which reads the Universal Product Code (UPC) symbol on food packages. The code identifies the product and its manufacturer, and the system automatically searches a file to determine the previously stored price of each item.

Besides displaying the description and price of each purchase on a lighted panel at the checkstand as the item is scanned, the system prints the same information on the customer's receipt.

"We expect the system to make shopping faster and easier for our customers," said Dan Stricklin, general manager of Shop Rite Foods, Inc., which operates 155 Piggly Wiggly supermarkets in the Southwest. "Now, for the first time, our shoppers will have a descriptive receipt that shows the price and the name of most items purchased.

"With such a record, there will be no question that the customer was charged the correct prices for all groceries purchased. If a customer feels the wrong price has been charged, she can review the tape with the checker or store supervisory personnel," he explained.

### 13,000 Products

About 13,000 products on the shelves of the supermarket here will have UPC symbols. For those items not yet labeled by the manufacturers, store employees will attach a symbol manually as they stock the shelves.

If there is no symbol on certain other items, the checker will key in the data at the checkstand.

The new system speeds up shopping because a single clerk can both check and bag a product in one easy motion. The checker merely places the UPC symbol face down and pulls the product across the scanning window. No special alignment is required since the scanner can read the symbol from any angle. Using a two-headed motion, the checker can scan and bag groceries simultaneously.

Multiple priced or mix and match groceries need not be scanned at the



Shoppers at this Piggly Wiggly supermarket are carrying away a more descriptive receipt of their purchases like the one shown in the shopping bag above. The receipt shows the name, as well as the price, of groceries, now that the store has installed IBM's 3660 supermarket system which scans the Universal Product Code like those shown on the coffee can and paper towel package.

same time. The system's controller tracks such items—like when canned corn is on special at three for \$89—and at the end of the transaction applies the right price formula.

### All Checkout Calculations

The system reduces misings substantially and performs all checkout calculations, including those for discounts, food stamps, refunds, store and vendor coupons, applicable taxes and correct change.

It also permits fast check cashing when personal checks are used to pay for purchases. The checker keys a customer's courtesy card number into the system to get immediate authorization to cash checks. Up to 24,000 check authorization accounts can be maintained in the system's controller.

### Sales Information

The system also captures up-to-date sales information needed to manage a complex, modern supermarket.

At the end of the day, the system transmits a report to a central IBM computer about the day's activities. This information will help store management improve inventory, reordering and warehouse operations to make sure the right groceries are on the shelves in the right quantities when consumers need them.

## Campbell Soup Gains

Consolidated net sales of Campbell Soup Company and its subsidiaries reached a record \$1,468,199,000 in the Company's 105th year, for an increase of 19.1% over sales of \$1,233,171,000 in fiscal 1973.

Approximately one-third of the total increase in sales for fiscal 1974 represented an increase in volume, with price increases accounting for the remaining two-thirds.

Combined sales of the company's foreign subsidiaries in Australia, Belgium, Canada, England, France, Germany, Italy and Mexico reached a new high with a gain of 20.8% over the previous year.

Frequent changes of pace and emphasis were characteristic of Campbell's marketing programs in 1974. Shortages of many ingredients and supplies, attributable in part to the impact of price controls, made it desirable to defer some new product introductions and to delay or reduce some marketing programs.

Wide fluctuations in consumer purchasing patterns were responsible for expenditures. Early in 1974, spiraling prices for meats, poultry and fresh produce made processed foods exceptional values. As a consequence, processed products were in heavy demand. Later in the year there was a more normal balance.

### New Macaroni & Cheese

In March, 1974 Franco-American Elbow Macaroni & Cheese was added to growing line of canned pasta products.

Advertising and recipe materials featured Campbell's condensed soups and Chunky Soups as timely food values helpful in providing nutritious family meals in an era of rising prices.

### Effective Advertising

Campbell Soup Company has built its business with quality products, actions and by effective advertising the consumer values it offers for sale. Campbell advertising has been effective because it is believable. It is believable because historically the company has sought to be truthful, tasteful and responsible. The Company states: "Our advertising is an asset of considerable economic value. It must be protected and enhanced."

### Human Wisdom

"There are two statements about human beings that are true: that all are alike, and that all are different. On these two facts all human wisdom is founded." Mark Van Doren

## Shopper Habits Shift

Supermarket News recently reported increased shopper price sensitivity is causing significant changes in merchandise mix and forcing some merchants to reexamine their traditional policy of low margins on staple items.

A trend away from high margin items in favor of increased staple purchases was revealed in a nationwide Supermarket News survey, but was most evident in Northeastern industrial areas that have been hard hit by unemployment.

There also has been an "unbelievable" response to price promotions in recent weeks, increasing movement of items by as much as 20 times regular movement. Coupon redemption has risen dramatically. Sales of secondary brands and private label are increasing at the expense of national brands.

"Ultimately, these trends will have to change our merchandising strategy," said one Northeastern retailer. "Traditionally, we've subsidized a large number of grocery items, selling them at 9 to 15 percent markups and making it up on other items. But as shoppers home in on basics, it will force us to look again at the markups we are getting."

### Canned Tomatoes Move Well

Canned tomatoes are moving well, as consumers have begun to use them separately as a side dish, as well as in sauces for pasta and less expensive meat cuts. The gain has been primarily in domestic brands, and one retailer said imported tomatoes were off 75 percent.

### Inexpensive Prepared Foods

Inexpensive prepared foods—both canned and frozen—are gaining in sales at the expense of higher ticket items. Canned spaghetti dinners, macaroni and cheese dishes, frozen pot pies and frozen pizza, for example, are up in sales according to several retailers.

Pasta, rice and potatoes are selling well. Bread sales also remain strong for most chains, despite price increases.

### Meat Tonnage Up

Meat tonnage is up slightly for many chains, although one retailer said consumers are not as responsive to sales on red meat as to other promotions. Poultry is selling well at lower prices than last year.

Tight money, shortages and product introductions were the major factors in product category tonnage changes, many of them dramatic, according to a recent SAMI inflation study.

### Dry Dinners Down

Dry packaged dinners, a hot item when introduced, showed a decline of 16.8 percent. According to SAMI, the category hit \$200 million in sales when it reached its peak last year, but has been receding constantly since then.

Now that the introductory period is over, promotional activities have slowed, pasta prices have increased and consumers are tending to make their own "convenience" dinners at a lower price. The category is leveling off, and most involved companies are weeding out slower-moving items.

### Beans

The high cost of beans contributed to a 17.6 percent decline in canned beans and pork and beans. Dried beans doubled in price from the year before, were down 18.2 percent in tonnage and were blamed for the higher price of the canned products.

The situation has changed since the study was made. In June, dried pea bean prices were 60¢ a pound and now are about 15¢ a pound.

The dramatic price decrease was attributed to an excellent crop. When the study was conducted, the crop situation was tight and suppliers were keeping beans off the market in order to swell prices.

Dried beans are expected to increase in sales as the price drop is reflected at the retail level. However, canned beans and pork and beans may not reflect a price drop, because tomato paste and packaging costs have risen.

Meat sauce rose 14.5 percent and instant potatoes increased 16.1 percent. This was said to point to an upswing in one-dish, cheaper meals. However, sources say, the situation is probably changing since fresh potato prices have dropped sharply.

Other evidence of cheaper-meat buying, some say, could be found in an 18.2 percent rise in barbecue sauce and meat sauce. Relish is up to 16.9 percent and Italian food sauce, used in many non-pasta dishes, is up 10.8 percent.

## Lead the Shopper

"To be successful in the food business, the businessman will have to identify his profitable customer base and try to lead, rather than react, to the shopper." So stated Harry G. Beckner, President, Jewel Food Stores, in a recent statement. "You will have to be more value oriented and customer aware than ever before," he stressed.

"The food retailer has taken a double whammy—product price increases and

rising labor costs," Mr. Beckner stated.

The outlook is that things will never be the same again in food, which has and is changing the consumer's perception of the importance and priority of food. In addition, it has raised expectations relative to quality and has significantly increased awareness of nutrition.

Consumers are adjusting their food buying to stay within their budgets by changing the mix of what they buy. The changes may involve a shift from expensive to inexpensive cuts, from beef on down to fowl and fish, then pasta and grain.

Convenience foods are losing out with strong increases in pasta offset by drops in meat "helper" dinners.

## Kraftco Marketing Research

C. C. (Deke) Grinnell has been named director of corporate marketing research of Kraftco Corp., according to Chester R. Green, senior vice-president, corporate development, marketing and research. Mr. Grinnell will be located at the Kraftco Research and Development Center in Glenview.

A graduate of Amherst University, Mr. Grinnell joined Kraft Foods in 1968 as manager of development in the long-range planning department, a position he held until 1970, when he assumed his most recent post, marketing manager of new products.

## Kraftco Gains

Kraftco Corp. reported a 22% increase in its third quarter earnings on a 28% gain in sales.

The large food processor earned \$29.5 million, or \$1.06 a share, up from \$24.2 million, or 87 cents a share, a year earlier. Sales rose to \$1.15 billion from \$911.7 million.

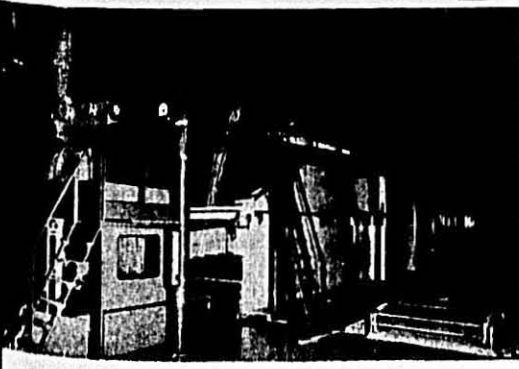
Included in the recent third quarter earnings was a credit of \$4.2 million, or 15 cents a share, from the company's elimination in the quarter of part of an \$18 million inventory write-down charged against second quarter earnings. The write-down, caused by a sharp drop in wholesale cheese prices, reduced second quarter earnings 65 cents a share. Kraftco said the "normal inventory turnover" had absorbed the balance of the inventory adjustment and that cheese prices are increasing.

Kraftco also said its 1973 third quarter earnings were depressed due to raw agricultural product shortages.

"Life can only be understood by looking backward. But it must be lived by looking forward."

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## A Quarter Pasta Luncheon

Editor's Note: Perino's is a posh Los Angeles restaurant.

Lunch for pennies at Perino's?

By Barbara Hansen,  
Los Angeles Times staff writer

That's exactly what happened the other day. It was a stunt, of course, a put-on by a macaroni company to dramatize how economically its products can be prepared.

Perino's regular pasta offerings include fettucine Alfredo, tagliatelle Bolognese and ravioli Genovese, all at \$6.75 a serving. But on this occasion, guests dropped down to Chicken Tetrazzini at \$0.1887 a helping, Macaroni Jardiniere at \$0.196, Spaghetti Campobello at \$0.225 and Noodles Monte Cristo which, at \$2.45 a serving, was the highest priced dish of the day.

### Back to Leftovers

Ted Stavropoulos, chemist with Globe Al Macaroni Products, Inc., worked out the recipes. Stavropoulos is Greek but had to eliminate such excellent Greek pasta dishes as pasticcio from his project. They cost too much.

Instead, he turned to canned soups, leftover meat, milk, frozen vegetables and the most basic seasonings—salt and pepper to bring each dish in under a \$0.25 a serving maximum.

And he did a good job. Perino's chef, Miguel V. Olmeda, who worked on the preparation of the food, said, "Pretty good. All right," as he surveyed his handiwork.

There were other comments like, "This is great. This is the greatest dish in the world." They came from Robert William, who is president of Globe Al.

### A Fussy Cook

Olmeda chose noodles Monte Cristo as the best dish. Sous-chef Carlos Borunda liked the looks of Macaroni Jardiniere. And William liked the looks of everything.

There were problems, of course. Stavropoulos, a fussy cook, wants his dishes baked and served immediately. Due to the mechanics of the luncheon, they had to stand in large restaurant pans for a considerable time before serving. And they did get a little gloppy, particularly Spaghetti Campobello.

But the main problem was, who wants to go to Perino's for a cheap lunch?



Robert William

However, William wasn't once a Warner Bros. publicist for nothing. "Hors d'oeuvre, dessert and wines will be up to Perino's high standards of haute cuisine," said his letter of invitation.

### Lettuce to Lemon

And the hors d'oeuvre were staggering. Beds of ice heaped with jumbo shrimp, crab and oysters and clams on the half shell were constantly replenished during a lengthy cocktail hour. And there were other tidbits such as hot, crab-stuffed mushrooms and little deep-fried cheese balls.

The luncheon started with limestone lettuce salad with bay shrimp—\$2.50 a serving on Perino's regular luncheon menu—and ended with hot lemon souffle—\$5 a serving. Waiters offered a choice of white or red wines. They were Bolla Soave—\$7.50 a bottle on Perino's wine list—and Sterling Vineyards Cabernet Sauvignon 1969—\$9.50 a bottle.

"I want your dishonest opinions," William said as he went from table to table to see how guests were taking the macaroni. Waiters presented samples of each of the four dishes as lovingly as if they were truffles.

In a more serious moment, William said, "Macaroni is the best food bargain in the world. I don't want you to think of it as just a cheap, starchy food."

William brought in some studio publicist friends to help stage the event. They winced when the accordion music, which was supposed to be Italian, switched to something Israeli. And they sat quietly when a guest who was in a

position to promote the macaroni products heckled William during his speech.

### Pasta Traits

William talked about protein, fat and calories. There's a surprising amount of the first in his macaroni products, he said, none of the second and not so many of the third as you would think. "The attractive skin, hair, eyes and teeth of the Italian people" come from eating pasta, he said.

William also provided a celebrity—Jim Backus—whom he placed, with understated elegance, in a corner. And he invited television crews who lit up the place.

Attached to each souvenir menu was a quarter, and emblem of the low cost of the food but a bane to parking lot attendants later.

Guests were given the recipes, broken down to the cost of each ingredient. In Noodles Monte Cristo, the salt, pepper and paprika, figured at the rate of 15 cents per pound, cost a penny. The most expensive ingredient in this dish turned out to be the noodles, at 55 cents for a 12-oz. package.

The noodles were also the costliest part of Chicken Tetrazzini but stepped down to second place in Macaroni Jardiniere, topped by two packages of frozen broccoli at 62 cents.

A profligate use of salt, pepper and paprika brought the cost of these ingredients up to two cents in Macaroni Jardiniere. But economy triumphed in Spaghetti Campobello, which included parsley as well as salt, pepper and paprika for the same two cents.

### Lawry's Foods Directors Approve Stock Offering

The board of directors of Lawry's Foods has authorized management to purchase up to 200,000 shares or slightly more than 10 per cent, of the outstanding common stock of the corporation through Jan. 15, at its discretion.

The program has been undertaken for several reasons, spokesmen indicated, including the possibility that shares so acquired may be used to provide for existing or alternative executive stock purchase and option plans, and for use in connection with possible future acquisitions.

The purchases are to be made on the open market or through other transactions, including block purchases and privately negotiated transactions. As of Oct. 31, there were 1,779,727 shares outstanding, at a book value of \$7.61 a share.

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## FDA Review

Dr. Alexander M. Schmidt, Commissioner of Food & Drugs, following Senate Hearings during which charges of industry favoritism, improper administrative practices, and harassment of employees were leveled at the FDA, has asked for a review of FDA procedures and practices. Both HEW Secretary Casper W. Weinberger and Assistant Secretary, Dr. Charles C. Edwards, have agreed with Dr. Schmidt's request and an impartial panel of three government and three non-government experts will carry out the review.

While the review specifically is aimed at the general process of decision making on new drug applications and specific charges of mishandling of adverse recommendations made by individual medical officers within the FDA, the panel's findings will undoubtedly affect handling of petitions covering food additives and food fortification.

### Criminal Responsibility

Approximately one year ago FDA instituted a policy of holding corporate officers criminally responsible for unsatisfactory conditions in food plants. This procedure will probably be reviewed by the U.S. Supreme Court as a result of the conviction of a supermarket president. The conviction was later reversed by the U.S. Court of Appeals for the Fourth Circuit. Indications are that FDA will ask for review by the U.S. Supreme Court.

FDA is continuing to bring criminal action against officers of companies—notice of 5 actions being taken was issued by FDA on August 14. These actions were against bakeries and charged that products were prepared, packed, or held under insanitary conditions, products were contaminated with insect filth, products were contaminated with rodent filth, and products were stored under insanitary conditions. A statement on August 21 covered criminal action brought against officers of another company for "product contamination and storage under insanitary conditions" of potatoes, cabbage, and celery. A number of additional criminal actions against officers of companies were also noted.

### Retail Sampling

A third review of FDA effectiveness will result from large scale retail sampling of food products. In a recent talk Dr. Schmidt commented on the retail sampling efforts and preliminary results as follows: "The final phase of recent FDA efforts to improve food quality and safety involves retail sampling—a selective and continuous survey to

tell FDA and industry if the results are worth the earlier investment in GMP's, HACCP and cooperative quality assurance.

"To sum up our new approach, HACCP inspections, guided by GMP's, tell industry and the FDA what needs to be done to assure safe, high quality food production and distribution. Cooperative Quality Assurance puts these findings into effect with maximum industry responsibility for its own operations; and, retail sampling tells how well the whole system is working.

"It is too early to tell the ultimate effect of all these new programs. A recent analysis of inspectional results has, however, disclosed some significant trends.

"We have just completed our first large scale retail sampling program. This program measured the safety, quality and truthfulness of labeling of four types of low-acid canned foods. More than 35,000 cans were randomly collected from retail outlets in 10 metropolitan areas. The results of our analysis are encouraging. In no can tested did we find any evidence of under-processing—the major indicator of a potential safety problem. And, all of the samples were well within established safe limits for residues of pesticides, industrial chemicals and heavy metals.

### Warehouse Improvement

"Another study which reached my desk within the past week shows significant improvement in sanitation in the food warehouse industry. In 1971, our inspectors found that only 41% of food warehouses were in full compliance with FDA sanitation regulations. New inspection figures given me this week show that 88% of food warehouses are now in full compliance.

"Clearly, the increased resources provided by this Administration together with our improved approaches and inspectional efforts have made an impact on food safety."

Because of a GAO (Government Accounting Office) report in the early 70's documenting disturbing sanitary violations in many of the nation's food plants, FDA was successful in securing additional funds for basic food plant and warehouse inspection. As a result, food plant inspections have been increased from less than 10,000 per year to 20,000 per year.

### Nutritional Labeling Moves Ahead

Nutrient fortification/enrichment and labeling are rapidly moving ahead with many major companies

committed to use of nutrient labeling on the majority of their products.

Nutrition labeling will become mandatory January 1, 1975 for foods shipped interstate to which nutrients have been added or for which nutritional claims are made. FDA has sponsored surveys to determine consumers' knowledge of nutrition and to develop best methods of disseminating information.

USDA has received requests for label approval from 60 firms that are incorporating nutrients information. The estimated number of labels involved, 1-3,000, is small as compared to the 150,000 labels used on meat and poultry products, however, the labels represent some high volume meat items such as hot dogs.

There can be little doubt that people are very much concerned with the nutritional content of their daily intake. Sales of "organic" or "health" foods are approaching the billion dollar per year mark and sales of vitamins and mineral supplements continue at high levels.

### Marketing

The October issue of Food Processing magazine states that it is difficult to precisely separate the exact contribution of fortification to the success of a marketing program. To be effective, new and expanded advertising is usually an integral part of the total fortification/marketing program. They cite several successful marketing programs attributed to enrichment such as the W. E. Long Company-Independent Bakers Cooperative program for enriched bread, and Standard Milling Company's "Maypo" hot oats cereal.

### Buitoni Case

Also cited is Buitoni Foods Corporation. Buitoni was the first company to introduce a macaroni that contained 20% protein and one of the first to remove all artificial preservatives from their line of frozen food products. Positive consumer reaction to these two programs and the fact that homemakers are currently treating pizza as a meal rather than a snack, was used as a basis for their decision to fortify pizza products.

In July '73 Buitoni decided to fortify its pizza so that a portion would supply 30% of the U.S. RDA of vitamins A, C, B-2, and calcium and protein. It contains 50% of the U.S. RDA of vitamin B-1 and 35% of iron. Stability and distribution evaluations of the vitamins and iron in the pizza showed that uniform production of the fortified product was possible. Only minor changes in equipment were needed to add the vitamins to the sauce.

January '74 the new product began reaching the marketplace without any additional cost to the consumer. While it is too early to determine the full impact of the fortification program it is interesting to note that in July '73 Buitoni Pizza rated 6th in the New York market and today it is tied for 2nd place with a 12% share of the market.

The company introduced their pizza product into the Philadelphia market about the same time July '74, and now enjoys a 10% share of the market and is rated in 2nd place.

Again, the package label was changed with the start of the fortification program and the package now contains a "flag" that reads "contains 30% or more of U.S. RDA for nutrients per serving."

### Guidelines

To prevent a fortification or enrichment power race among companies FDA has proposed various guidelines and additional ones will be developed over a period of time. Any fortification guidelines will result in time consuming debate. As an example, Del Monte Corporation has petitioned FDA for approval to add vitamin C to tomato juice so as to make it a more desirable breakfast drink. This immediately brought adverse comments from the citrus industry as the tomato juice would be fortified to the same vitamin C level as citrus juice and, consequently, would eliminate one of their marketing pluses. The debate continues even though FDA has approved the petition.

### Education Program

FDA commissioned J. Walter Thompson Advertising Agency to produce a 14 minute movie which has been given the title "Read the Label, Set a Better Table" starring Dick Van Dyke. The animated nutrient characters were developed as part of this education program and appear in the movie. Pamphlets have been prepared to be used in educational programs and suggestions for TV and radio commercials have been developed. In addition a slide show consisting of 27 slides and a script have been prepared for general consumer audiences. All of the information is available to nutrient education groups or to food manufacturers who can include their name on the literature before distribution.

### Workshops

FDA consumer affairs officials throughout the country are scheduled to hold some 600 workshops on nutritional labeling this year and, it is



### Somebody Better Shut Off the Pasta Machine!

Leo Pollano (center), owner of Venezia Italian Foods, Inc., of Redwood City, California, helps hold a strand of noodles from the pasta-making machine at his booth at the Western National Restaurant Convention held at Brooks Hall, San Francisco in September 1974. A highlight of his booth was the "World's Largest Lasagne" made by his firm. They used 200 lbs. of noodles, 200 lbs. of tomato sauce, 50 lbs. of Ricotta cheese, 25 lbs. of Mozzarella cheese, plus meat fillings, seasonings and other goodies for the mammoth lasagne. Helping to hold the noodles are (left to right), Elwood Kirschner, Executive Chef of Del Webb's Primadonna Restaurant in Reno, Nevada, Ted Shaker, Restaurant Columnist for the Palo Alto (Calif.) Times, Pollano, and his children Michael and Sandra. Venezia Italian Foods make over 100 frozen specialty products which include pre-portioned lasagne for individual servings, cannelloni, ravioli, tortellini and manicotti. They are available to leading frozen food distributors throughout the West.

estimated that these workers will reach about 60,000 persons. Since many of these persons will be dieticians, teachers, extension agents, etc., the ultimate number of people reached will be substantially higher.

41% of consumers participating in an FDA survey said that they received their knowledge of nutrition from their early schooling with the next largest group, 31%, stating that their information sources are magazines. 24% learned most about nutrition from newspapers. Nutritional knowledge gained from the "mother" ranked fourth with 14%, just ahead of television programs and diet books each accounting for 12%.

### Requests for Information

One of the encouraging aspects of nutritional labeling and the making available of nutritional information is that a high percentage of the requests for information is from the professional groups. It is anticipated that the requested information will be used in education programs and by the medical profession in furnishing information to patients. With the education push and the medical profession it is anticipated

that the consumers will become more aware of nutrient content of their foods and the need for a balanced diet.

### Honor to Marco Buitoni

Marco Buitoni, nephew of Giovanni Buitoni, founder of the Buitoni Foods Corp. and a leader in the pasta manufacturing business, was selected by the City Club of New York to be one of 12 foreign-born New Yorkers to be honored for making New York a "world city."

### Food Is Something More

It's a very odd thing—  
As sad as can be—  
That whatever Miss T. eats  
Turns into Miss T.

### Words of Wisdom

"Anyone who is well adjusted these days just isn't paying attention."  
"If you say what you think, don't expect to hear only what you like."

Malcolm Forbes

## Peavey doesn't quit working until dinner is served.

It takes more than  
wheat to make King Midas  
Semolina and Durum flour.

It takes art and science.

That's why our Technical Center  
uses the newest laboratory equipment to  
analyze every crop of durum wheat.

But our field representatives rely on a well-trained eye  
and a pocket knife. Peavey's newest durum mill,  
in Hastings, has automated virtually every  
milling process to maintain quality and uniformity.

But our miniature macaroni press still needs  
the knowing hand of a pasta maker.

We can precisely graph the color,  
nutritional content, even  
shape retention in finished pasta.

But bite and flavor are  
personal evaluations again.

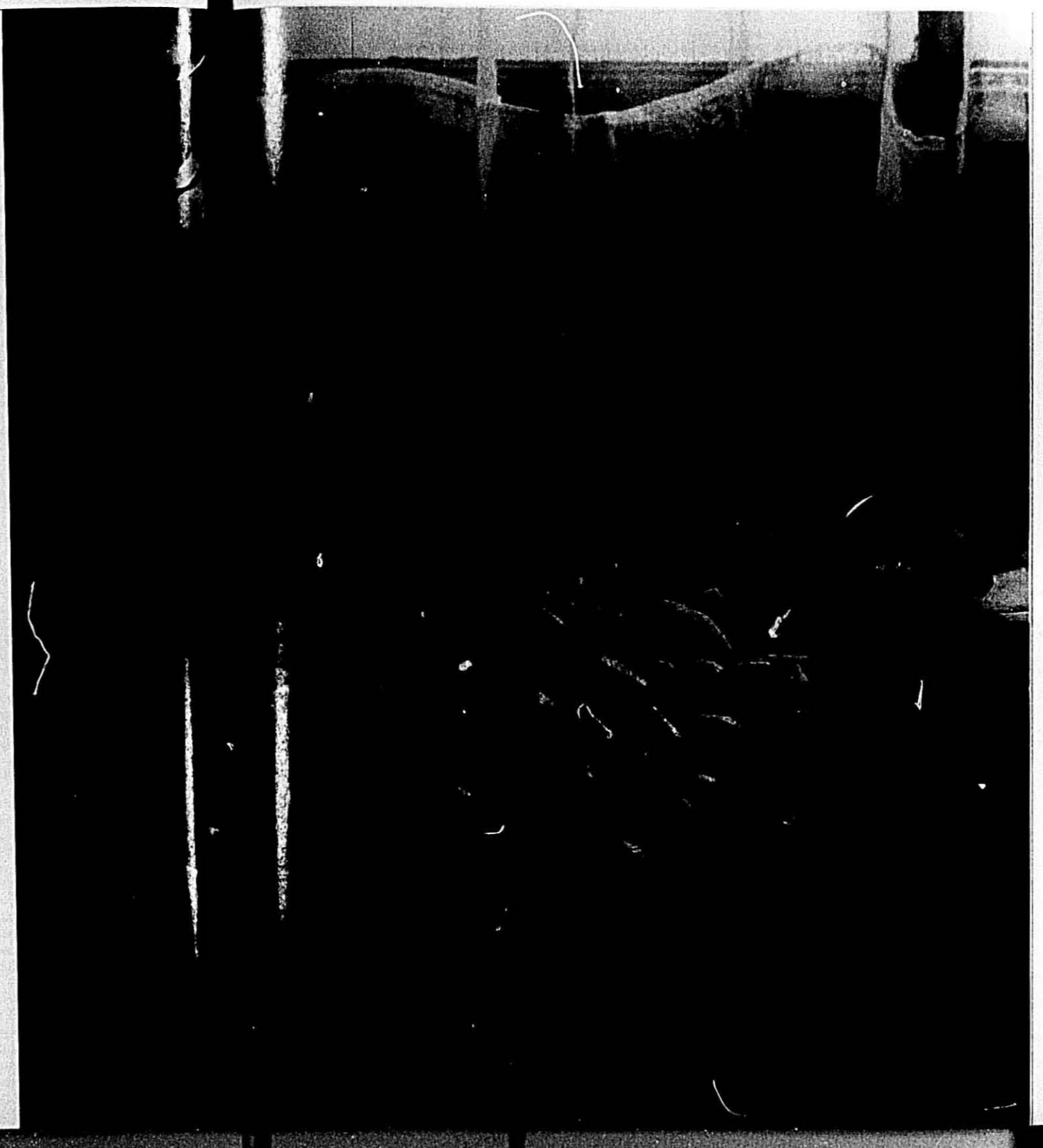
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## Most People Know Little About Nutrition

from *The National Observer*

Mrs. Consumer enters a supermarket. She sees 10,000 different food items, 85 cuts of meat and poultry and 260 combinations of brands, sizes and varieties of vegetables alone to choose from. She knows their price will dent her household budget more severely than they did the week before. She thinks her only hope for getting dinner on the table by 6 will be to pop frozen potpies in the oven by 5.

Then, intercepting her youngster's lunge for the Twinkles, she spots the disturbing public-service sign: "Will your family receive the U.S. Recommended Daily Allowance of vital nutrients today? What have YOU done to insure it?"

To many consumers, already harried by the economics of food and conditioned by the sociology of food, nutrition is as provocative as broccoli and as lucid as alphabet soup. Nutrition, as most remember it from their 8th grade health class, has a lot to do with vitamins and minerals and something to do with building bodies at least 12 ways.

There is a great deal of evidence building to suggest that as world-wide food shortages and dietary deficiencies worsen, nutrition may become a popular science, a theme for far-reaching domestic and international policy and the focus for consumer consciousness-raising.

### The Signs

The signs are larger than the one the shopper sees in the supermarket:

(1) Over the last 20 months the U.S. Food and Drug Administration has initiated more than 50 actions to upgrade the nutritional information on food labels, i.e. food labels must list nutrients as a percentage of Recommended Daily Allowances, rather than the much smaller Minimum Daily Requirements used for years to specify vitamins and minerals needed to maintain health.

(2) In June the Senate's Select Committee on Nutrition and Human Needs heard 6 panels of interest-group representatives criticize the Government for failing to develop a national-international nutrition policy. The groups called for an expansive program of professional and popular nutrition education.

(3) Following those hearings, Sen. Edward M. Kennedy, Mass. Democrat, ordered his staff to add reimbursement

for nutritional services to his proposed national-health-insurance plan.

(4) Controversies over the relationship between diet and health, between cholesterol and atherosclerosis, between salt and hypertension and between maternal nutrition and infant retardation have made their way from professional journals into the popular media.

(5) Federal legislation is pending that would provide \$50 million over 5 years to medical and dental schools for planning, developing and implementing programs of nutrition education.

Not since World War II, when eating was associated with surviving as well as thriving, has world-wide interest in nutrition and a proper diet been so high. In November the United Nations held a World Food Conference in Rome to consider the distressing facts and frightening possibilities of the international food situation.

### Hunger and Malnutrition

Experts say that more than one-half billion children in the world are malnourished. Scores die daily in the drought areas of Africa's sub-Sahara. World population is increasing by 70 million persons a year, but production of fertilizer for rich harvests is not keeping pace. World-wide grain reserves have dwindled to their lowest level since 1947 (a 30-day stockpile). According to Dr. Norman E. Borlaug, father of the "Green Revolution," "If there is a crop failure now in any of the large grain-producing areas of the world before there are reserves re-established, we could have disasters in which tens of millions could die, and we could do nothing about it."

Closer to home, in the land of historical food abundance, the nutritional report card is hardly satisfactory. In 1965 the U.S. Department of Agriculture said that half of 7,500 households it surveyed reported diets that failed to meet recommended allowances for such vital nutrients as vitamins C and A.

In 1969 the White House Conference on Food, nutrition and Health was held and from it resulted the current food-stamp program and food programs for the elderly, nutritional labeling, open-ended and unit-pricing of food and food-additive guidelines.

While many question the effectiveness of the food-stamp program there is consensus on one point—Middle- and lower-income Americans are not only less well-nourished than they ever have

been, but perhaps are also less capable, financially and intellectually, of eating correctly. They're beset both by rising food prices and by inadequate knowledge of what constitutes good nutrition.

### Technology and Diet

"We're in the midst of a food revolution," says Dr. D. Mark Hegsted, nutrition professor at Harvard. "Technological changes in the food industry don't necessarily mean that convenience foods are less nutritious than other foods, but there is certainly less personal control over the individual diet."

What is critical in an age of food shortages and changing food technology, the experts say, is for people to eat better for less money, and to eat less and feel better physically. The problem is that the average consumer knows little about nutrition.

### A Fledgling Field

The Food and Nutrition Board of the National Academy of Sciences' National Research Council has flatly stated that nutrition information is incomplete. Man's requirements for many nutrients have not been established, the board says, and only in recent years has the essentiality of many nutrients been proved.

In the 1940s the board set down the first RDAs, the recommended dietary allowances from which almost 30 years later the FDA developed its Recommended Daily Allowances. The board's RDAs are defined as "the level of intake of essential nutrients considered . . . to be adequate to meet the known nutritional needs of practically all healthy persons." But allowances must not be confused with nutritional requirements, says Dr. Paul E. Johnson, the board's executive director.

"Nutritionists don't know who they are talking about when they say or that will fulfill man's nutritional requirements." We just don't know what different individuals need to stay healthy, and we know nothing about the nutritional variations among people. With RDAs we can only guarantee that, on an average, most human nutritional needs will be adequately met," Johnson says.

### A Nutritional Catch-22

To many people, the situation is nutrition's own Catch-22: The nutritional needs of the nation will not be determined.

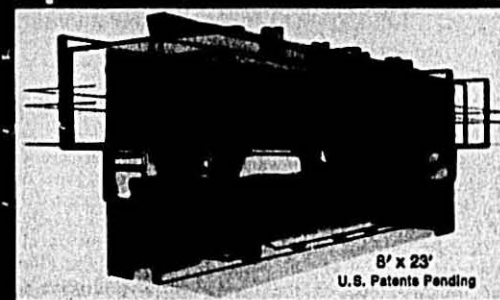
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## About Nutrition

(Continued from page 24)

mined, expanded nutritional knowledge will not be forthcoming, and sound methods of educating the public will not be developed without Federally supported nutrition surveys and research. But the Government will not support such wide nutrition programs, many feel, until nutritional needs and reliable nutrition knowledge have been established.

"Nutrition is simply not a high-priority item," says Dr. William J. Darby, president of the Nutrition Foundation in New York City. "It's not one of those things that a politician can put in front of the people as an attention-getter. Maybe it's our fault; we haven't made the nutritional needs of this country sufficiently clear."

"The solutions to nutritional problems in this country must come from the Federal Government, from the food industry and from consumers themselves," says Dr. Jean Mayer, professor of nutrition at Harvard. "It is a worldwide problem, everybody's problem, and the consequences will be extraordinary if we ignore it. Just as war is too important to be left to the generals, we are learning at last that nutrition is too important to be left to nutritionists."

### A Table of Vital Nutrients

The U.S. Food and Drug Administration's Recommended Daily Allowances (RDAs), listed here, represent the estimated amounts of nutrients the average healthy person needs daily to stay healthy. Because nutrient requirements for individuals are not known, these quantities are weighted on the high side, the FDA says; many adults need only two-thirds to three-fourths of these established amounts, and children need only about one-half.

	Infants and Children Under 4 Years	Adults and Children Over 4 Years
Protein	28 g.*	65 g.*
Vitamin A	2,500 IU	5,000 IU
Vitamin C	40 mg.	60 mg.
Thiamine	0.7 mg.	1.5 mg.
Riboflavin	0.8 mg.	1.7 mg.
Niacin	9.0 mg.	20 mg.
Calcium	0.8 g.	1.0 g.
Iron	10 mg.	18 mg.
Vitamin D	400 IU	400 IU
Vitamin E	10 IU	30 IU
Vitamin B6	0.7 mg.	2.0 mg.
Folic acid	0.2 mg.	0.4 mg.
Vitamin B12	3 ug.	6 ug.
Phosphorus	0.8 g.	1.0 g.
Iodine	70 ug.	150 ug.
Magnesium	200 mg.	400 mg.
Zinc	8.0 mg.	15 mg.
Copper	1.0 mg.	2 mg.
Biotin	0.15 mg.	0.3 mg.
Pantothenic Acid	5 mg.	10 mg.

RDAs, stated in grams (g.), International Units (IU), milligrams (mg.), and micrograms (ug.):

\*If an individual's protein intake comes primarily from high-efficiency-protein foods such as milk and milk by-products, the RDA for protein is 45 g. for adults and 20 g. for infants.

## Nourishing Reading

For those who might want to enhance their nutrition knowledge, the following publications are helpful:

**The Family Guide to Better Food and Better Health.** By Ronald M. Deutch. Meredith Corp. 277 pages. \$7.95.

**Living Nutrition.** By Fredrick J. Stare and Margaret McWilliams. John Wiley & Sons, Inc. 487 pages. \$10.95.

**Food and Man.** By Miriam E. Lowenberg et al. Wiley. 459 pages. \$11.50.

**Let's Talk About Food.** By Phillip L. White. Publishing Sciences Group, Inc. \$6.95 (available in September).

**"Food Is More Than Just Something To Eat."** Prepared for the U.S. Department of Agriculture and Health, Education, and Welfare in co-operation with the Grocery Manufacturers of America and the Advertising Council. Free. Write Nutrition, Pueblo, Colo. 81009.

## Slim Growth Expected

Shipments of corrugated and solid fibre products are expected to achieve only modest gains during 1975, according to economist John W. Enders, who reported to a group of some 450 corrugated executives at the 1974 Annual Meeting of the Fibre Box Association.

Enders, director of marketing economics for Lionel D. Edie & Co., Inc., expects total shipments to increase 0.4 percent, from 224.3 billion square feet projected as a probable total for 1974, to 225.2 billion square feet in 1975.

He cites a combination of four adverse developments—premature retreat from tight money policies and efforts to contain federal spending; a wage explosion; another jump in oil prices; and more bad weather and poor crops—as responsible for present and continued difficulties with the economy.

On a brighter note, Enders anticipated inflation beginning to recede by next spring or summer, with housing and consumer spending leading the economy into a recovery period.

## Exercise

America must be the only country in the world where people jog five miles a day for exercise, then take an elevator up to the mezzanine.

## Egg Production

The nation's laying flock produced 5,367 million eggs during October, 3% less than a year ago, according to the Crop Reporting Board. Layers on farms November 1 totaled 280,000,000, down 5% from the 294,000,000 a year earlier, but up 1% from a month earlier. Rate of lay on November 1 averaged 62.2 eggs per 100 layers, up from 61 a year ago and slightly above the rate of 61.2 on October 1, 1974. Egg-type chickens hatched during October, 1974, totaled 35,500,000, down 23% from a year ago. Eggs in incubators on November 1 at 31,400,000, were 13% below a year ago.

## Egg Processing

The Poultry Division, Agricultural Marketing Service, USDA, reports:

A total of 48 million dozen shell eggs were broken September 15 through October 12, 1974 under the USDA's Egg Products Inspection Act—down 6 percent from the corresponding four weeks of last year. Percent decreases by regions were: South Atlantic, 12; North Atlantic, 9; North Central, 7; and South Central, 6. Eggs broken in the West were up 1 percent from the 4 week period of last year.

During the four weeks, 70.7 million pounds of liquid egg products were used in processing—down 7 percent from the same period last year. Ingredients added in processing totaled 2.4 million pounds, 35 percent less than a year ago.

Liquid egg production (including ingredients added) for immediate consumption and processing totaled 25.1 million pounds during the 4 week period—up 6 percent from the same period last year. Products for immediate consumption totaled 11.5 million pounds compared with 9.3 million a year earlier. Those for processing totaled 13.6 million pounds, compared with 14.5 million last year.

Frozen egg products amounted to 25.4 million pounds, 18 percent less than last year. Dried egg production was 5.7 million pounds, 10 percent below the 4 week period a year ago.

Cumulative totals July 1 through October 12, 1974 and percentage increases from the corresponding 1973 period were as follows; shell eggs broken—191 million dozen, 10 percent; liquid egg used in processing—280 million pounds, 11; liquid products for immediate consumption and processing—93 million pounds, 20; and dried products—21 million pounds, 8. Frozen products, at 109 million pounds, were down 2 percent from the same period last year.



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## Advice on Buying

by Richard G. Myers, executive vice-president of Seaboard Allied Milling Corp., Kansas City, at the annual general managers' conference of Quality Bakers of America Cooperative, Inc.

You have built a strong successful organization, well-equipped to cope with the ever-changing times. By utilizing the best thinking of all members for the common wealth, combined with a high order of integrity and fairness to suppliers, Q.B.A. has demonstrated that there is great strength in numbers under intelligent leadership.

I believe that the series of events commencing some two years ago have created conditions that enhance the advantages of working through group action. For, there is no doubt that the long expected transition from a world of surplus foods, albeit poorly distributed, to a world of scarcity, or at best, very close adjustment, has occurred almost overnight.

### Nakedly Exposed to Market

With the ending of surpluses and elimination of the U.S. subsidy on wheat exports, domestic processors—both millers and bakers and also consumers—are now markedly exposed to the world wheat market's gyrations. These gyrations have been made especially volatile by the close adjustment of supply and demand. Therefore, more than any time before, we must look outside our country for many answers which we formerly sought within our domestic confines.

As a supplier of the baker's principal ingredient, it is appropriate for me to discuss the problems faced by flour millers, and how these affect bakers' prices and in the timing of buying decisions.

### Millers' Unit Costs Up 50%

In the decade prior to 1972 the milling industry enjoyed a relatively stable cost of manufacturing. True, mild inflation and yearly labor increases were experienced, but enlargement of capacity of milling units, combined with cost savings inherent in the continuing conversion from sack to bulk shipments served to provide compensatory cost control. Inflation in the past two years, especially in the areas of power and labor, together with the high price of wheat and money have expanded unit costs by approximately 50%.

### Accounts Receivable in Climb

The high price of money saw Seaboard's interest costs alone this past year rise 250%. This situation is magnified by the inadequate supply of work-

ing capital to cover the enormous demands of agribusiness. There is not only the problem of financing purchases of cash wheat and providing the greatly increased margins now required for futures hedges, but there is also the need to carry swollen accounts receivable as our baker customers purchase our products at double the price of just two years ago. Although payment terms may not have been liberalized, automatically every customer now owes roughly twice as much as before for the same amount of product. Consequently, some millers find their receivables almost as great as their net worth.

### Much More for Inventories

Furthermore, with the lengthened wheat pipeline brought about by the shift of milling capacity from wheat production areas to consumption areas, a very substantial sum is required to maintain adequate raw material inventories. In some instances millers are forced to operate with a short supply of wheat and a limited variety selection.

As enormous users of bank funds the milling industry in total has probably more than doubled its line of credit in the past two years in order to do approximately the same amount of business in number of cwt. sold. The question bothering many millers today is, exactly how much credit can their financial strength warrant, and beyond that, how much can the banks allocate to this one industry, which taken as a whole is not growing? Already some mills are contracting, due in large part to the money crunch, others have sold out to other millers as well as to newcomers into the industry, and several other companies are presently wrestling with serious financial problems.

### Great Risk in Feed Swings

In this era of inflationary markets the role of millfeed as a flour pricing factor takes on heightened significance. Many years have witnessed swings of 30¢ or 40¢ in millfeed credits per cwt. of flour as markets moved slowly from lows of perhaps 70¢ to highs in the neighborhood of \$1.10. In the last few months, millfeed credits have been as high as \$2.25 and in one two-week period fell 75¢. Such unprecedented uncertainties dictate caution in accepting long-term flour bookings and suggest the wisdom of introducing healthy reserve factors into quoted flour prices. Reduced supplies of corn, soybeans and

other feed ingredients create a friendly attitude toward millfeed prices, but there is a real danger that demand for mixed feeds—where millfeeds are used—might fall as cattlemen and poultry raisers turn to cheaper ingredients, such as forage, or reduce the number of animals and birds because of relatively low prices for consumer meat products.

Of increasing concern is the question of availability of protein wheats. The Kansas winter wheat crop for 1974 averages only 11.3% protein, with practically no carryover of high protein from previous crops. Canadian wheat production is presently estimated at 10% less than last year, serving to divert overseas demand to U.S. dark northern spring. And don't forget that the estimate for the 1974 spring wheat crop is down 15% from last year.

Protein is scarce and, therefore, expensive. Bakers will have to reevaluate their need for protein in view of the increased costs, and millers are having to scramble for needed supplies. In one week, the basis for 13% hard in K.C. soared as much as 17¢. At Friday's market close (Sept. 27) the difference between 12.5 and 13% protein wheat was 28¢ a bushel, or about 64¢ on a cwt. of flour.

Incidentally, if the baker would be more lenient on ash requirements he would help conserve some protein. By using the same mill streams this year as last year the miller will produce a flour of similar color, although ash readings will be higher because of the greater mineral content in this year's crop of wheat.

### No Final Word on Exports

Turning now to Washington, at this moment we do not expect any government programs or actions that might have significant bearing on flour prices. Of course, the final word has not yet been given on the possibility of restraints on grain exports.

Flour purchasing has become vastly more complicated in the last year with the rapidly changing wheat prices. When daily market swings were held to 10¢, up or down limit moves were rare. Today, with 25¢ limits permitted on the Kansas City Board of Trade, limit markets are frequent, and we have even witnessed a few occasions of

(Continued on page 30)

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### Advice on Buying

(Continued from page 28)

limit up and limit down in the same market session. Such occurrences may be with us until the day when, hopefully, adequate wheat reserves will again be held.

Bakers, who in the past mulled over a quoted price for a week before taking action, or who bought in the evenings, or on weekends, find more and more that their flour suppliers quote only during the market session, and then subject to ability to place hedges for any sale of appreciable quantity. Consequently, flour sells over a wide range of prices during a single market session. Frequently, changes in market relationships make for fast-moving flour quality differentials, creating difficulties for bakers trying to establish fixed specifications.

#### Overseas Miller Like Baker

Until the time two years ago when the world wheat market went from surplus to shortage and prices went from stability to volatility, our company was probably unable to appreciate fully the agonizing loneliness of the flour purchaser. We hardly understood the formidable task of trying to select those market spots where the buyer would commit his company to a longtime purchase that could bring competitive advantage at best and no disadvantage at worst. With the removal of the protective umbrella of subsidized, ever-constant world prices under which Seaboard formerly operated its overseas flour mills, we now have to think like a baker.

Operating in five other countries and being subject to some rather unusual price ceiling regulations, we only dare buy wheat when it is cheap enough to make flour for the proper price. Yet, we don't dare buy ahead if we feel that the wheat market could retract, because we then would have a mill full of wheat overseas, and a market drop that could raise the threat of flour imports.

#### Decline in Flour Foods Use

As we have raised our flour prices in these overseas countries, consumption has declined rather dramatically. People are eating other foods or eating less. With limited financial reserves, these countries have decided to give first priority to oil imports over food. Let us not forget that 80% of the wheat exported last year was sold at considerably lower prices than today's levels, even though present prices are well under last year's highs. Seaboard is supplying its overseas mills only

enough wheat to maintain a full pipeline. Demand for wheat overseas is price elastic in our view.

Fortunately, the American baker today is not worrying about the last nickel. He is more concerned, as he should be, with establishing a position at those times when flour costs permit a purchase with a reasonable certainty of a profit on existing bread prices. Our company highly recommends this obviously astute buying philosophy.

#### Wheat Situation

What once appeared to be a huge 1974/75 wheat crop in the making has turned out to be a record harvest of only modest proportions. The current production estimate of 1,781 million bushels is 4% above last year's record crop, but well below earlier expectations. A 19% increase in harvested acreage was countered by sharply lower yields of 27.8 bushels per acre, primarily the result of unfavorable weather and disease.

Despite the record harvest, total wheat supplies will be 6% less than a year ago since carrying stocks of 249 million bushels were the smallest in more than 25 years.

#### Disappearance Declines

First quarter (July-September) disappearance was off the pace of a year ago. Lagging export shipments, a moderately lower mill grind, and sharply reduced feeding were the reasons. However, demand for the remainder of the year is expected to be strong. A broadly based surge in export bookings during October lifted cumulative exports plus outstanding sales for the year to over 800 million bushels. The outlook for 1974/75 is for another billion bushel export year, perhaps more. Domestic mill grind is expected to recover from the low first quarter pace and could total 530 million bushels for the whole year. Price relationships and prospective low livestock and poultry output are expected to keep wheat feeding well below the level of recent years. Tight feed grain supplies combined with low quality wheat could result in additional feeding during the remaining 3 quarters, pushing total 1974/75 feed use to around 100 million bushels. These demand projections would cause ending

stocks to remain about unchanged from the low level of last July 1.

#### Prices Firm

Wheat prices have firmed since July after recovering from last spring's sharp decline. Farm prices by mid-October had risen to \$4.85 per bushel, 20% above the July level. Worsening crop situations in major exporting countries and slow-paced marketings by U.S. farmers have been the primary reasons for recent strength in prices. With heavy export expected the remainder of the season, wheat prices are expected to continue strong for the balance of the 1974/75 crop year.

#### Quarterly Durum Report

Durum wheat production at 78,000,000 bushels is 8% below the 1973 crop but 7% above two years ago. The slight decline from the September 1 forecast is the result of lower yields in Minnesota. U.S. average yield at 20.9 bushels per acre is the lowest since 1961 and compares with the 28.5 bushels last year and 28.6 two years ago. Harvest of durum wheat was completed by mid-October. Heavy dews in the morning and mid-September caused some loss of quality and quantity of grain in Minnesota. Late September freezes in North Dakota resulted in some damage to late planted immature durum.

#### Stocks Down

Stocks in all positions totaled 87,900,000 bushels, 10% less than a year earlier and 24% below October 1, 1972. Farm holdings of 63,900,000 bushels declined 18% from a year earlier while off-farm holdings were up 12%. Disappearance during July-September 1974 amounted to 19,600,000 bushels compared with 24,500,000 a year earlier. Smaller supplies this year were directly related to adverse weather conditions which cut yield to 20.9 bushels per acre.

Total exports of durum wheat were lower. This crop year only 5,500,000 bushels were shipped overseas compared to 12,000,000 bushels for the same period a year ago. The decrease in shipments was directly related to labor problems at the Duluth-Superior ports.

Cash prices for durum wheat held firm to the demand of terminal buyers, mostly in the \$6-\$7 range.

	Durum Wheat Prod.			Yield per Acre			Harvested Acreage		
	1,000 Bushels	Est.	1974	Bushels	1973	1974	1,000 Acres	Est.	1974
California	156	100	150	39.0	50.0	50.0	4	2	3
Minnesota	992	2,088	2,014	31.0	36.0	31.0	32	58	94
Montana	4,221	4,004	4,840	31.5	22.0	20.0	134	182	242
N. Dakota	65,493	75,980	68,990	28.5	29.0	21.0	2,298	2,620	3,190
S. Dakota	2,050	2,688	3,120	25.0	24.0	15.0	83	112	208
Total U.S.	72,912	84,880	78,014	28.6	28.5	20.9	2,550	2,974	3,737

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## Durum Production

Durum production in the United States was estimated at 78,014,000 bushels as of November 1. North Dakota, which produced 88% of the total had an average yield of 21 bushels to the acre, down 8 bushels from 1973.

### DURUM SUPPLY from U.S.D.A. Quarterly Durum Reports (in thousands of bushels)

Year	July 1 Stocks	Production	Supply
1971-72	58,489	91,805	113,494
1972-73	69,251	72,912	142,163
1973-74	36,870	84,860	121,730
1974-75	29,533	78,014	107,547

### DURUM DISTRIBUTION (in thousands of bushels)

Year	Mill Grind	Seed	Exports
1971-72	33,066	3,584	43,804
1972-73	35,730	4,200	64,981
1973-74	35,001	5,200	40,168

## In Canada

The 1974 durum wheat production was estimated at 85,500,000 bushels on the basis of September 1 conditions. This well over last year's crop of 51,800,000 bushels. The yield per acre, indicated on conditions of August 15, was 21.8 bushels per acre compared to 28.5 a year ago. Durum wheat exports were slightly below a year ago at 15,000,000 bushels.

Great Plains Wheat reports weather reversals this fall did not seriously affect the quantity of wheat in Canada but quality suffered greatly. An unusually large percentage of the 1974 crop is considered to be "utility" grade which means feed wheat. Traditional Canadian customers are studying the situation, attempting to determine what use can be made of the utility grade and No. 5 durums.

Mr. G. N. Vogel, chief commissioner of the Canadian Wheat Board, has stated: "It is evident that we will not be able to supply the full quantities of the grades preferred by many of our customers."

## Concern in Argentina

Trade sources from Argentina report rumors the Argentine Grain Board is closely checking wheat crop prospects with a view toward suspending again grain export sales. The rumors follow recent reports that adverse weather conditions have possibly affected yields and reduced the size of the crop. Earlier reports indicated the new Argentine crop would probably not exceed 5.8 million to 6 million tons (between 213 million and 220 million bushels). Greater concern is over the durum produced in Argentina, now ex-

pected not to exceed 450,000 (about 16.5 million bushels). Production at that level would leave an exportable surplus of durum wheat of only 300,000 tons. Argentina has already committed 150,000 tons of durum to Algeria and 70,000 to Libya, reducing even further—if not completely prohibiting—Argentina's ability to export any further quantities of durum wheat.

## The Fertilizer Problem

The tragic shortage of fertilizers, a key ingredient in the world food crisis, has started to ease.

"A couple of months ago, we couldn't buy it, even at the new, very high prices. Now, supplies are becoming available," said Robert Steiner, the top United Nations fertilizer expert.

Another major shift in the last 90 days, he said, is the decision by North Americans and Europeans to invest in new fertilizer capacity in their own regions.

In an interview at the 100-nation World Food Conference, he said that money to pay inflated fertilizer bills is the crying immediate need of the poor countries.

"Many countries in Africa couldn't order any fertilizer at all for the coming 1975 season," he said.

One ton of fertilizer adds seven tons of grain production. That is why these nutrients are vital to feeding the world's fast-growing population.

Steiner is co-ordinator of the International Fertilizer Supply Scheme set up in July by the UN Food and Agriculture Organization (FAO).

### Outlook

After consulting in capitals around the world, he added up the needs and future outlook:

For the next 8 to 12 months, the 21 neediest nations are 900,000 tons short of nutrients, \$820 million worth at present prices.

Of this, 87 per cent is in three huge neighboring populations—India, Pakistan and Bangladesh.

FAO member governments have pledged only \$22 million so far to Steiner's fertilizer fund, a further \$21 million is coming from a UN emergency fund.

The signs are that direct government-to-government aid will have to carry most of the burden. The United States, for example, has allocated 700,000 tons of fertilizer aid.

However, U.S. aid is labelled "political" by many American and world critics. An estimated 50 per cent goes to South Vietnam, a country not even on the FAO neediest-nation list.

Soaring oil prices added \$3.6 billion to the poor countries' fertilizer bill, assuming they could buy what they need.

Vast expansion of farm planting in the United States and other rich countries helped create the shortage of available fertilizer.

### Investment Cycles

But Steiner says high prices and shortages were coming even without these trends. "Investment in fertilizer production follows cycles with peaks of oversupply followed by shortages," he says.

Enough new plants now are planned to take care of world needs in the late 1970s. They take about four years to build.

China has begun a 13-factory building program to become self-sufficient in fertilizer. China imported \$2 billion in wheat and other grain since 1972.

Major new capacity is planned in Mideast oil countries. "Gas worth \$20 million is flared off (burned) daily," Dr. Jamshid Amqezegar of Iran said. "This gas could be used to make fertilizer."

Interior Minister Amouzegar says Iran would be willing to supply the gas raw material free if other countries put up the expensive factories to supply the hungry nations.

Present new fertilizer plants in Iran are strictly commercial ventures supplying home markets for Japanese and West Germans.

### To Meet Food Crisis

Steiner slices solution of the world food crisis into three parts:

- To feed the hungry now, we must ship food.

- For the harvest six months away, we must export fertilizer to countries that can't produce enough.

- For the most practical, economical solution for years from now, we need to increase investment in fertilizer capacity.

This last year's crisis has worked against world thinking, pushing countries to try to assure their own self-sufficiency first, Steiner says.

"But fertilizer is too important a subject to be left to a few major producing and consuming countries to control," he argues.

Realistic about the limits to squeezing direct gifts out of richer countries, especially in present world recession times, he stresses the need for a "monitoring" system to smooth out capacity-ups and downs.

The World Food Conference will vote on a new information forum for keeping world investors aware of supply and demand trends.

## Fertilizer Consumption

Fertilizer consumption in the United States and Puerto Rico during the year ended June 30, 1974 is placed at 47.0 million tons, an increase of 9 percent above the 43.3 million tons consumed during the 1972/73 fertilizer year.

Fertilizer consumption represents all commercial fertilizer tonnages sold or shipped for farm and non-farm use as fertilizer. Materials used in the manufacture of registered mixes or for uses other than fertilizer are excluded.

Consumption of mixed fertilizer containing 2 or more primary plant nutrients was 24.1 million tons for the 1974 fertilizer year, an increase of 7 percent over the preceding year.

The use of all direct application materials increased 11 percent during the 1974 fertilizer year to 22.9 million tons. Primary nutrient materials (N, P<sub>2</sub>O<sub>5</sub>, K<sub>2</sub>O) accounted for 20.8 million tons of the total compared with 19.3 million tons a year ago. Secondary nutrient and micro-nutrient materials increased from 1.5 million tons in 1973 to 2.1 million tons in 1974. Most of this change was due to increased gypsum consumption in California.

Nitrogen materials (excluding organics) used for direct application increased 1.1 million tons to 14.5 million tons. Anhydrous ammonia, up 22 percent from the previous year, accounted for the majority of the increase. Phosphate materials totaled 2.3 million tons, 2 percent more than the previous year, and all potash materials at 3.5 million tons were up 15 percent from last year. Tonnages of natural organics used were virtually unchanged at 0.5 million tons.

In North Dakota: Commercial fertilizer used during the year ended June 30, 1974, totaled 477,993 tons, according to the North Dakota Crop and Livestock Reporting Service. This is a decrease of one percent from the same period a year earlier. Use of mixed fertilizer at 257,383 tons increased 8 percent from a year earlier and accounts for 54 percent of total tonnage used compared with 49 percent for the preceding 12-month period.

Direct application materials (N, P<sub>2</sub>O<sub>5</sub>, and K<sub>2</sub>O) totaled 280,344 tons. Nitrogen materials used amounted to 132,825 tons, down one percent; phosphate materials 110,116 tons; up two percent; and potash materials 17,603 tons; up 30 percent from a year earlier. Natural organic materials totaled 292 tons compared to 300 tons the previous 12-month period. Data originated with State Laboratories Department, Bismarck, North Dakota.

## Can Macaroni Products Be Produced Successfully in North Dakota?

"Yes", says Bulletin 496 from the Economic Development Administration of the U.S. Department of Commerce. This "Analysis of the Economic Feasibility of Processing Pasta Products in North Dakota" dated October, 1974, was prepared by Ronald G. Fraase, David E. Walsh and Donald E. Anderson, of the North Dakota State University at Fargo. Mr. Fraase has gone with the North Dakota State Wheat Commission. Dr. Walsh has taken an appointment with a food company, but Professor Anderson is still at the University and will answer questions for us when we hold our Technical Seminar on campus April 13-16, 1975.

### Combination-Mill-Plant

The basic thesis is that by having a combination mill-pasta processing plant in the area of wheat production, they will save freight of moving wheat to the mill and milled products to the plant and will be able to gain market penetration in three-quarters of the country by negotiated freight rates in railroad car shipments.

### Cost Estimate Below

Estimated cost of a model pasta processing facility is based on two capacities with price data for December, 1973. It is noted that inflation and material shortage makes these estimates unstable over long periods of time.

### Labor-Transportation

Labor requirements for the 30 million pound plant would be 50, with 9 in the mill and 41 in the pasta plant. For twice that capacity, it would take 60 in the macaroni plant and 10 in the mill. Estimated labor costs are low because North Dakota has a labor surplus area.

The transportation analysis of this study has two objectives: (1) to determine optimum product flows within the pasta industry, given the existing rate structure; and (2) to determine the

sensitivity of the optimum flow solution to rate changes. The mathematical model chosen to carry out the transportation analysis is a specialized technique of linear programming called The Transportation Method.

### In Conclusion

In the conclusions, it is stated: "This report should be of interest to those pasta processors who are thinking in terms of expanding their market area and market potential. The concept of processing pasta products in North Dakota and shipping the finished product to major consumption areas is worthy of consideration by firms wishing to penetrate several regional markets from a single plant location. It is believed by the authors of this study that pasta processing facilities with the capacity discussed in the model plants should be considered only by firms who are already in the industry or by firms who currently purchase large quantities of pasta products to be used in convenience foods of some type (canned or boxed soups, packaged dinners, etc.). A new firm attempting to operate a facility of this size with a new brand name consumer product would find marketing difficulties virtually impossible to overcome."

Copies of the study may be obtained from the Department of Agricultural Economics, North Dakota State University, Fargo, North Dakota 58102.

## Canadian Wheat Crop

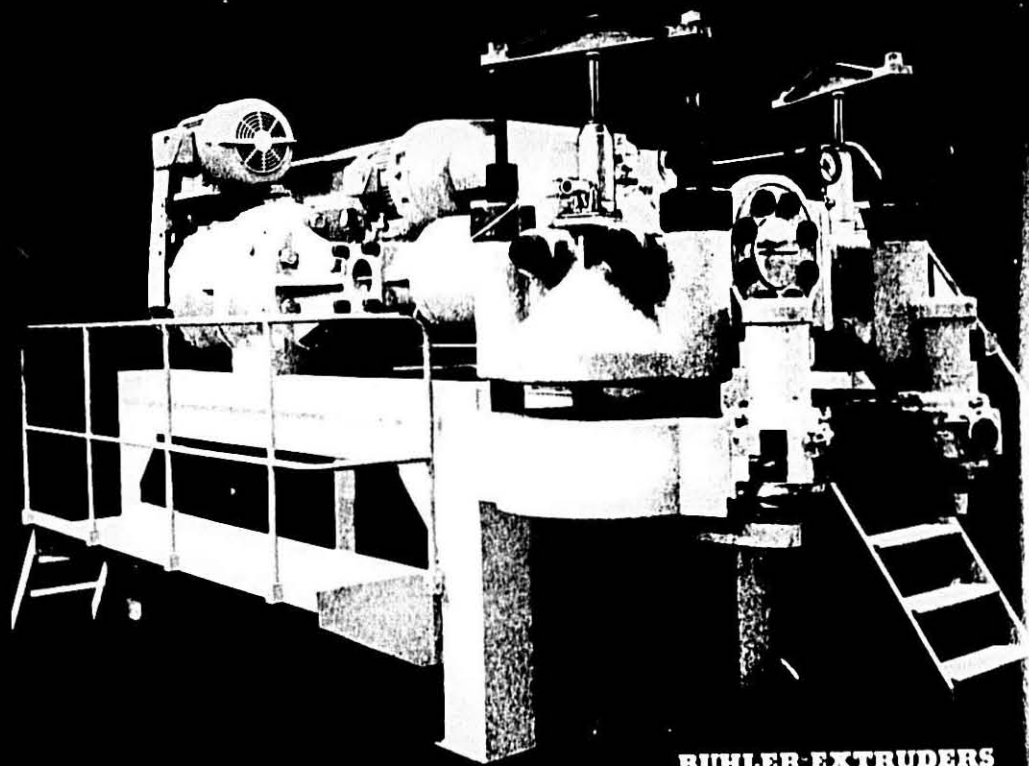
At the indicated level, the 1974 crop is off 82,225,000 bus, or 14%, from the final 1973 harvest 604,738,000.

Following are 1974 production estimates for major grains in Canada, with comparisons for prior years, in thousands of bus:

	1974	1973	1972
Winter wheat	19,070	14,812	15,440
Spring wheat	441,943	538,128	546,950
Durum wheat	61,500	51,800	48,560
All wheat	522,513	604,738	610,950

	Construction costs of Model 30 Million Pound Capacity Plant	Pasta Processing Facilities 60 Million Pound Capacity Plant
Mill:		
Building and Flour Storage	\$ 455,000	\$ 750,750
Mill Equipment Including Installation	1,050,000	1,732,750
Wheat Storage	135,000	222,750
Total Mill and Facilities Cost	\$1,640,000	\$2,706,000
Pasta Processing Plant:		
Building and Site Work	\$1,280,000	\$2,160,000
Short Goods Line (Including Pkng.)	943,995	1,120,150
Long Goods Line (Including Pkng.)	1,049,000	2,057,695
Die Washer	20,475	20,475
Installation, Set-up and Delivery	784,000	960,000
Total Pasta Plant Cost	\$4,077,470	\$6,318,320
Architect's Fees (8% of Building Cost)	147,600	250,680
Misc. Handling, Storage, Lab and Sanitation Equipment	132,000	210,000
Land	4 acres=4,000	6 acres=6,000
Total Mill-Plant Cost	\$6,603,070	\$9,491,000

# SANITARY.



**BUHLER-EXTRUDERS**  
are the most sanitary you can buy!

Model TPCE shown above  
is equipped with specially-  
designed twin head

**Completely Re-designed.** Buhler's new line of extruders have the basic features which have made BUHLER the favorite throughout the world... plus many new improvements which put it far ahead of any other you can buy in North America today!

#### Super Sanitary

- Structural members are completely enclosed, can't collect dust or dirt.
- Motors and drives are in the open, away from product area, completely accessible for service.
- Drive guards are open at bottom so dust falls through, can't accumulate.
- One-piece mixing trough has smooth rounded corners for easy cleaning, no place where dough can lodge.
- Unique trough design virtually eliminates product hangup on mixer walls.
- Outboard bearings on mixer shafts absolutely prevent any product contamination by lubricant.

#### Finest Quality Product

- Efficient vacuum completely de-aerates product.
- All processing elements are of proven design, are properly sized and balanced to rated capacity.

#### Seven Models Available

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

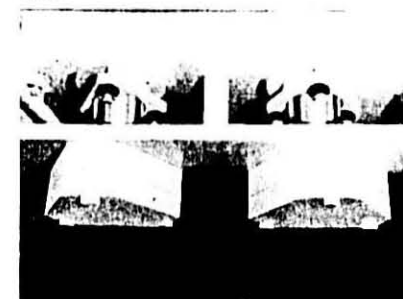
#### 3.-Built Drives

- All motors, sprockets, chains and electrical controls are standard components readily available throughout the U. S.

**Full Details** on the new Buhler extruders and other Macaroni Processing Equipment. Call us or write: BUHLER-MIAG, INC., 8925 Cata Blvd., Minneapolis, Minn. 55426, (612) 545-1401/Eastern Sales Office: 580 Sylvan Ave., Englewood Cliffs, New Jersey 07632, (201) 871-1401. BUHLER-MIAG (Canada) LTD., Don Mills, Ontario, (416) 445-6910.



Mixing trough is one-piece stainless-steel construction. Unique shape prevents product hang-up on walls.



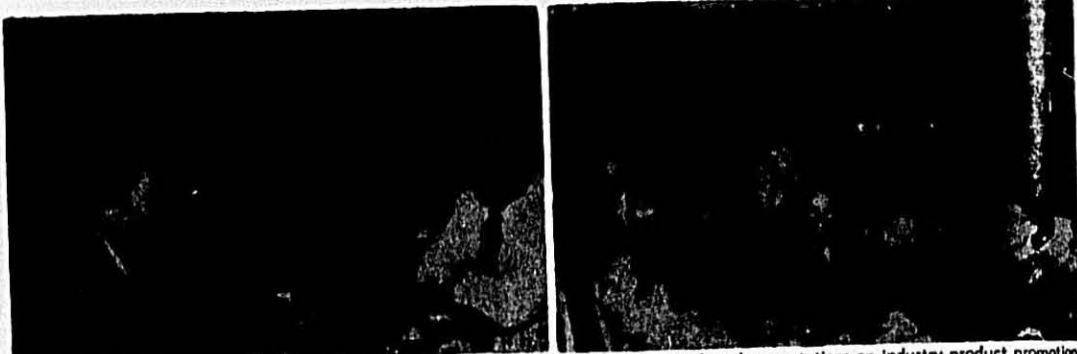
Bearings of mixer shafts are completely separate from product seal. Seals may be replaced without removing bearings or shafts. Product contamination virtually impossible.



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

Complete Macaroni Plants by

# BUHLER-MIAG



**West Coast Macaroni Meeting** at Little Joe's Restaurant, Los Angeles, November 12 heard presentations on industry product promotion, profits of work, and discussion on durum.  
At the table on the left: Peter F. Vagnino, Jr., Vincent DeDomenico, and Bob Borelli. On the right (foreground): John Williams. Seated, left to right are Roy Andrews, Jean Hassell, Pat Gabriele, Paul Guido, and Kay Rauen. Standing are Fred Spadafora and Sid Bone.

#### Gioia Advertising

Gioia Macaroni Company of Buffalo has created a unique product personality in their current television spot advertising, reports Advertising Age.

Gioia is a real family business, run by a real Italian family. Instead of making generalized product claims, as the company had previously been doing, the family became the symbol of its own products. They were related to historical and ethnic background by shooting actual scenes in a community in Italy that Gioia family came from.

Sign-off states: "Our family name goes on everything we make". The Gioia label is on the products eaten at the Gioia table.

#### Mamma Mia

D'Amico Macaroni Co., Steger, Ill., is introducing its line of Mamma Mia pasta products in the Chicago area. The company, a supplier of private label products, is using singing star Louisa Prima in its TV, radio and print ad campaign. Prima signs the products' slogan: "Mamma Mia, Atsa for Mia."

#### Feliks Basista

Feliks Basista, 70, founder of New Mill Noodle Company and reputed maker of Kluski noodle passed away in Chicago November 18. Survivors include his wife Harriet and a sister, Mrs. Mary Romancyk.

#### Federal Deficits

In the past ten years the federal government has spent \$102.9 billion more than it took in. In four fiscal years alone, 1968 and 1971 through 1973, outgo exceeded income by more than \$85 billion. That's money. That's inflation.

#### Divestiture of Major Italian Foods

The FTC has received an application from Golden Grain Macaroni Co., San Leandro, Calif., requesting prior Commission approval of the proposed sale of its 51% stock ownership in Major Italian Foods Co., for \$245,000 in cash to Major.

Major, located in Seattle, Wash., is engaged in the business of manufacturing and selling macaroni and other dry paste products. Since its incorporation in 1961 the company has been managed by the Merlino family.

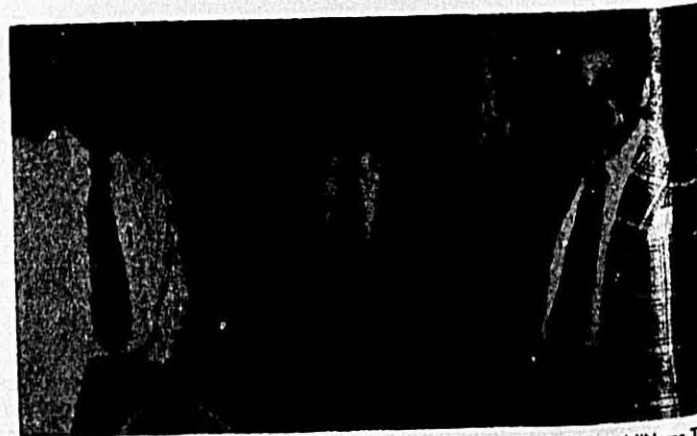
FTC approval is required under the terms of a modified order issued by the Commission on June 26, 1973, which requires divestiture of respondent's interest in Major.

#### Peavey Company Annual Report

The Peavey Company annual report for 1974, Centennial year of operation, has this to say about its durum operation:

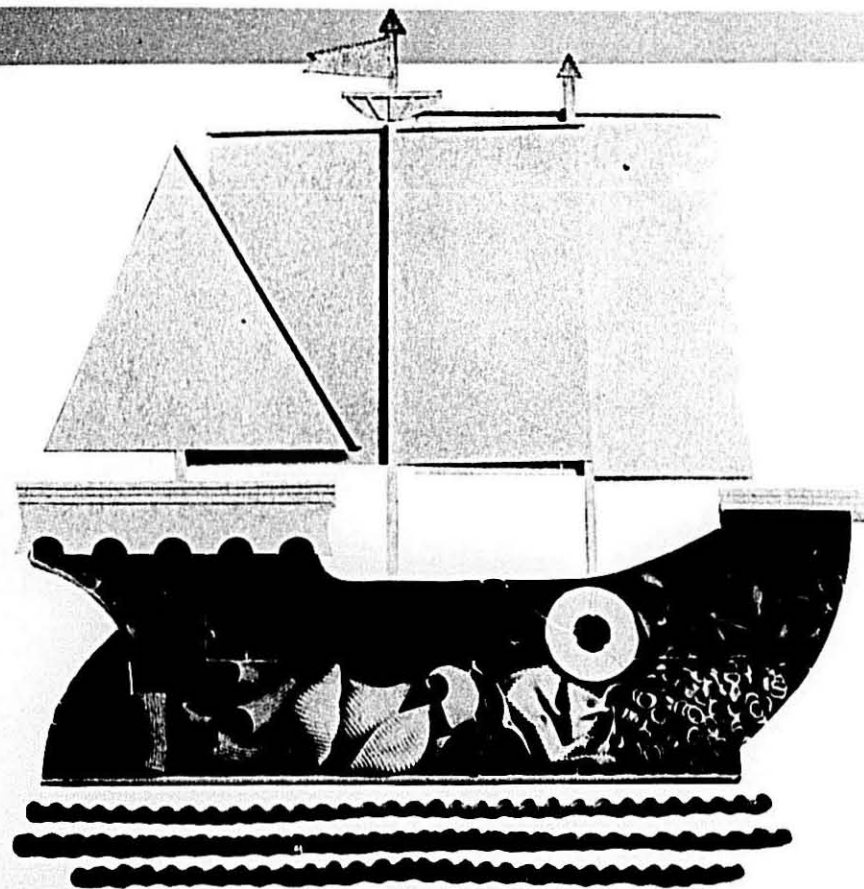
Durum products include semolina, durum flour and blended flour products for manufacturers of spaghetti, macaroni and other related products. Milling is done at Hastings, Minnesota; Superior, Wisconsin; and Buffalo, New York. Distribution spans the country with sales chiefly by the company's sales force and some broker representation.

Sales volume of 1974 surpassed that of fiscal 1973. The year was accompanied by concern for durum wheat supply and experienced substantial substitution of hard wheat products for durum products.



**Dennis James** (center), star of television game shows "The Price Is Right" and "Name That Tune", is guest of honor at a dinner given by the Golden Grain Macaroni Co. Shown with James are (left) Paskey DeDomenico, president of Golden Grain and Dominic Forte, National Sales Manager. The occasion was a two-day party at the MGM Hotel in Las Vegas where Golden Grain was host to 60 of the firm's top salesmen and their wives.

THE MACARONI JOURNAL



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## ADM MILLING CO.

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**Ambrette Dough Sheet Former with teflon slot die for 20" sheet, 1000 lb./hr. Die support stand and connecting tubes. Excellent condition. Price \$1,500. Call or write A. G. DeFelice, U.S. Macaroni Co., East 601 Pacific, Spokane, Wash. 99202, (509) 747-2085.**

**FOR SALE—1 Large Mixer and Kneader. Good condition. Write Box 336, Peletine, Ill. 60067.**

**WANTED—Clyburn Model B Carton Machine. Write Box 336, Peletine, Ill. 60067.**

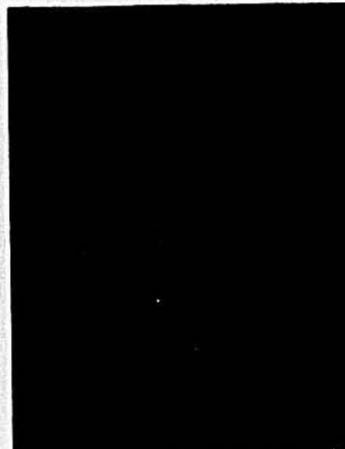
**FOR SALE—83 page book on Macaroni, Noodles, Pasta Products by James J. Winston, \$3.00 postpaid if check is sent with order. P.O. Box 336, Peletine, Ill. 60067.**

### Fred Mueller Joins Skinner

C. F. Mueller Jr. has joined the Skinner Macaroni Co., Omaha, Nebraska, as manager/market development, a new position in the company.

At Skinner he will be involved in the development and launching of programs for new products and new markets. He will work closely with and report to W. E. Clark, senior vice president-sales, and Alan Pascale, vice president-marketing.

Mueller graduated from Dartmouth College in 1957 with a major in Economics. He completed the Graduate School of Sales Management and Marketing at Syracuse University in 1961 and then



C. F. Mueller Jr.

joined a family-founded business, the Mueller Macaroni Company, Jersey City, New Jersey.

Over the 15 years spent with the Mueller organization, he served in various capacities including retail sales representative; manager, chain store operations; regional manager and director of marketing. He left Mueller Macaroni in 1972 to start his own consulting firm and was in that business until joining Skinner.

### Hershey Pasta Companies Merge

Two pasta companies owned by Hershey Foods Corporation will become one, according to an announcement made by Harold S. Mohler, Hershey's chairman of the board and president.

Delmonico Foods, Inc., of Louisville, Kentucky, will be merged into San Giorgio Macaroni, Inc., of Lebanon, Pa., with the operation to be headquartered in Lebanon. Delmonico's plant operations will continue in Louisville under the Delmonico brand name.

Mr. Mohler said the two companies had combined sales of over \$21,000,000 in 1973. They employ nearly 400 persons.

The merger is to become effective January 1, 1975, with the new company operating under the direction of Willoughby S. Dade, president of San Giorgio. Joseph P. Viviano, president of Delmonico, will continue to head operations in Louisville. Several management changes were announced in connection with the merger.

Henry J. Guerrisi has been named Vice President and Treasurer of the combined operation with responsibility for all financial operations including accounting and budgeting. He is a native of Lebanon and a graduate of Villanova University. He joined San Giorgio in 1956 and held various positions, includ-

ing that of Treasurer and Controller, prior to being named Vice President last December.

Jerome V. Guerrisi has been appointed Vice President with responsibility for all sales and marketing activities for the merged companies. Current sales and marketing staffs at both Louisville and Lebanon locations will now report to him. Also of Lebanon, and a graduate of Villanova University, he joined San Giorgio in 1960 as sales representative, then held positions as Assistant Sales Manager and Sales Manager before being promoted to Director of Sales and Marketing in December, 1973.

Charles J. Niskey has been named Vice President with responsibilities for all manufacturing operations in Lebanon plus the firm's frozen food manufacturing at East Greenville, Pa. Niskey, a native of Berwyn and a resident of Hershey in 1967, was named Assistant to the Plant Manager at San Giorgio in 1968 and was promoted to Plant Manager in 1969.

### Brezden's Ace

Bill Brezden, senior account executive, International Multifoods Durum Division, recently made his first hole-in-one in 32 years of golf. He did it playing in a threesome at Madden's Resort course near Brainerd, Minn.

Using a pitching wedge from an elevated tee on the 108-yard, par 3, eighth hole, Brezden's shot went in on the fly. "It didn't touch the green at all," he says. "The ball was wedged between the cup and the flag."

He was so unnerved that he flubbed his next tee shot, finished with a 40 for nine holes, and didn't play the back nine.

Attesting the ace were the other two-thirds of his threesome: Sal Maritato, Brezden's boss, and engineering head Hank Arneson.

### How the Brands Line Up in Britain

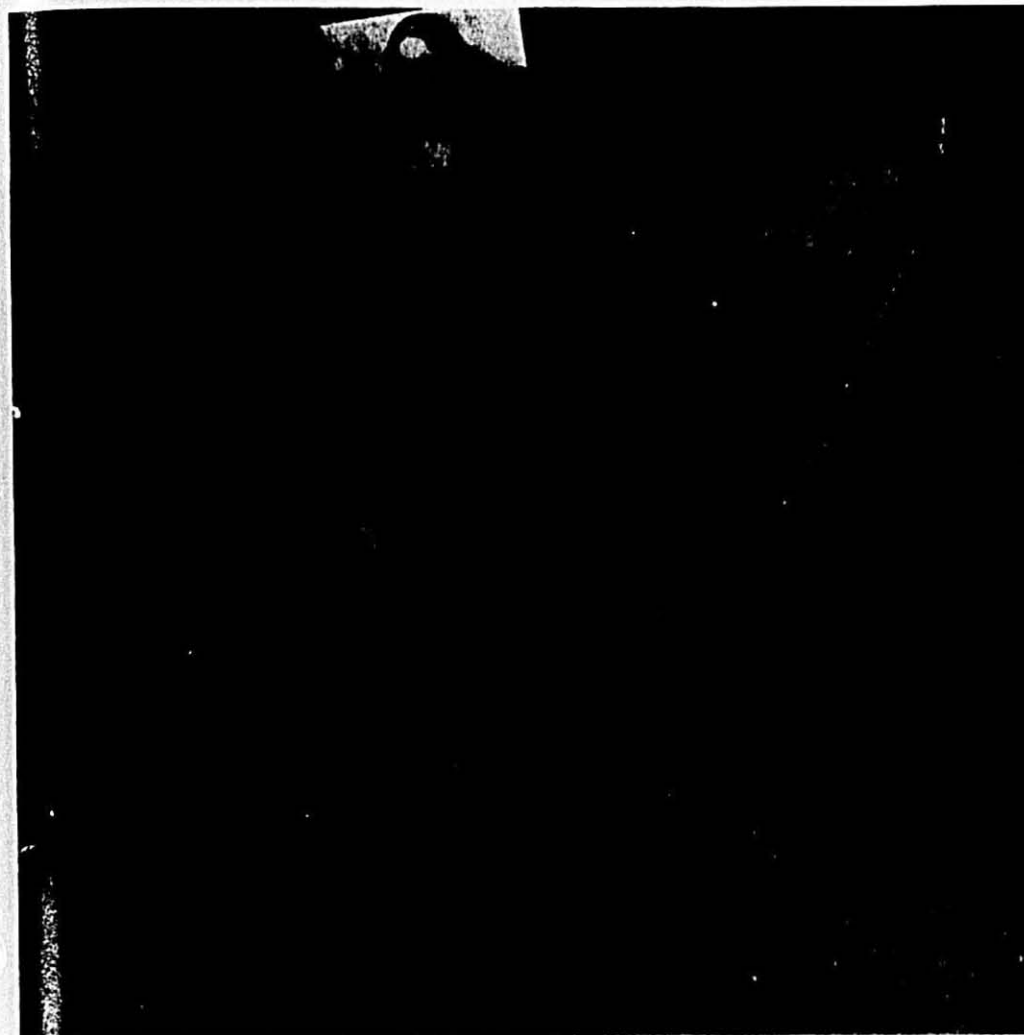
Pasta Post from St. Albans reports the following brand shares by value are reported for the packaged dry pasta market:

Quaker	20%
Record	9
Buitoni	7
Marshall's	6
All others	58
(219 brands estimated)	

Here is the distribution by sizes and shapes:

Shortcut macaroni	31%
Long spaghetti,	
ten inches or more	40%
Noodles, rings, lasagne	
and assorted shapes	29%

THE MACARONI JOURNAL



# LITTLE MASTERPIECES

Macaroni, spaghetti, vermicelli, lasagne, ziti, shells, linguine, mafalde, tripolini, orzo—and many, many more.

They're all pasta—they're all different—and they're all masterpieces made by artists with a true love for and dedication to their profession.

Diamond employs its own brand of artistry in developing a frame for these

pasta works of art—creative folding cartons, labels, streamers, shelf-talkers and point-of-purchase displays.

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**Okay.  
Who put egg in the noodles?**



**Sal Maritato did.**

So now when you buy Multifoods' new noodle mix called "Duregg" — all you add is water.

We've gone ahead and added the egg solids to Multifoods' top-quality durum flour.

A number of our customers have already ordered "Duregg" in hefty lots.

Here are a few reasons why you should:

- Duregg eliminates time-consuming, in-plant blending of flour and egg solids with expensive machinery.
- Duregg is ready when you need it. No thawing,

less chance of contamination, and less time and mess.

- Duregg eliminates the need to re-freeze unused egg.
  - Duregg assures a consistent blend.
  - Duregg eliminates the necessity to inventory two ingredients. Storage and record keeping is reduced.
  - Duregg simplifies delivery. Now it's one source — Multifoods.
  - Duregg lowers your manpower requirements.
- Enough said. Order your Duregg with a phone call.

Duregg is a registered trademark of International Multifoods Corp.



**INTERNATIONAL  
MULTIFOODS**  
DURUM PRODUCTS DIVISION  
GENERAL OFFICES, MINNEAPOLIS, MINN. 55402

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