

**THE
MACARONI
JOURNAL**

**Volume 62
No. 11**

March, 1981

Macaroni Journal

(ISSN 0024-8094)

MARCH, 1981



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The Macaroni Journal

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MACARONI JOURNAL

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Winter Meeting Report

A clarion call went out from the Winter Meeting held at Boca Raton Hotel & Club, Boca Raton, Florida in early February. It was a call for strategic planning, cooperation from all elements of the industry from growers to millers to manufacturers for increased support to reverse the flattened sales curve the industry has experienced in the past five years.

MARCH, 1981

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The Pastaville presentation given at the International Durum Forum in Minot was intended to tell the durum growers about the domestic pasta industry and enlist their support for its development with the same enthusiasm that they have shown to export sales in the past fifteen years. It was presented in essentially the same form at the convention.

Robert M. Howard of International Multifoods gave a description of milling; C. Mickey Skinner of Skinner Macaroni Company described pasta manufacturing; Joe Viviano of San Giorgio-Skinner, Inc. reviewed consumer marketing (see Macaroni Journal for February). Elinor Ehrman of Burson-Marsteller gave an update on product promotion; Darla Tufto of the North Dakota Wheat Commission and Dennis Hill of the Minot Chamber of Commerce described the impact of Pastaville as a community event with statewide and national publicity.

President Lester R. Thurston, Jr. cited the need for strategic planning and meeting competition to turn the pasta sales curve upward once again. See story that follows.

Dr. Steven R. Holmberg of American University, Washington, D.C. reported on the NMMA Membership Survey and led round-table discussions for membership in put.

The Executive Committee will work with Dr. Holmberg between now and July 12-18 when the 77th Annual Meeting will be held at LaCosta in Carlsbad, California to develop a mission statement setting forth the general objectives, program strategies, data base and resource strategies that will lead to a written Association Long-Range Plan.

The Board of Directors made an appropriation to study the Italian import situation and its impact upon coastal markets. Dependent upon the findings, it will be determined whether it is feasible to enter suits for countervailing duties to offset this foreign competition.

Net weight labeling discussions with Food & Drug Administration were reported upon. Story appears on page 13.

Larry Youngblood of Pillsbury's American Beauty Division was elected to the Board of Directors.

Thanks go to the hosts of the Supplier' Socials which were applauded

Cover Photo

A skillet of hot elbow macaroni salad with onions, green peppers and mushrooms makes an excellent accompaniment to salmon steaks or other seafood for Lenten menus. Lent begins March 4.

Winter Meeting Report

(Continued from page 3)

by the ladies as one of the best features of NMMA conventions:

ADM Milling Company
Amber Mill, GTA
Ballas Egg Products Co.
Braibanti Corporation
Buhler-Miag Corporation
Cooley Sales Company
Commercial Creamery
DeFrancisci Machine Corp.
Egg Corporation of America
Faust-Pak Corporation
Food Engineering Corporation
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Monark Egg Corporation
North Dakota Mill & Elevator
Peavey Company
Rexham - Wright Machinery Div.
Rossotti Consultants Associates
Seaboard Allied Milling Co.

A Clarion Call

from President Lester R. Thurston

From the beginning of my involvement in the concept of evaluation and planning, I became increasingly convinced that the mission, objectives and programs of the Association were not being given sufficient consideration and the business of the Association was not being conducted in a manner similar to the way we run our own business. True, we do have an ongoing product promotion program that everybody views with enthusiasm and approval. Beyond that we are essentially a reactive body, reacting with vigor and vitality whenever a threatening issue arises that calls for concerted action.

Solving problems, however, is not planning or executing programs that will favorably influence future direction and progress. It merely gets you back to where you were before the problem arose.

If this Association is to effectively serve the industry in this fast chang-



Lester R. Thurston, Jr.

ing world, it is going to have to become something quite different in the future than it has been in the past. I am confident most of you share that opinion to one degree or another.

The dilemma arises in the fact that changing the scope and intensity of our activities leads immediately to budgetary considerations.

I have been advised to approach the issue of money with caution and only after the planning process has identified specific needs. The problem with that approach is that it ignores a reality presently confronting the Association and delays the opportunity to take appropriate action.

Recently I have been able to obtain information about the potato industry which is certainly one of our chief competitors.

The Potato Board was founded only in 1973 in an effort to stem the decline of potato consumption in the United States. Let me read to you from the opening statement to growers contained in the 1979-80 operating plan of the Potato Board. "The Potato Board says new government potato consumption figures prove the Board's promotion program is succeeding. Last year's per capita consumption is the highest in 32 years. We are convinced, they say, that we've changed consumer attitudes about potatoes, and this is reflected in a new direction for consumption rates."

The success of their efforts is demonstrated in results of a survey recently undertaken by the U & A Potato Board about "Starches Served at Yesterday's Main Meal - Base; Re-

spondents who ate yesterday's main meal at home (78% of total sample).

Starch Served	% of Base
Potatoes	43
Bread	7
Pasta	5
Rice	13
Noodles	6
No starch served	25

Not much doubt about the competition we face in starch consumption. We have always recognized the fact, but I've never seen it in this impressive a comparison.

Let's take a look at the 1980-81 potato campaign samples of ad reprints from the program.

In the eight years of the Board's existence, they have been so successful in changing consumer attitudes towards potatoes they are now changing their copy strategy from non-fattening to promotion of potatoes as the world's most versatile vegetable.

In the 1980-81 Potato Board Plan is budgeted at \$2,400,000 of which a million alone will be spent on media and public relations.

On the strength of that impressive program, I suggest to you when we look for reasons for our flat experience during the past five years, we better be conscious of the impact of competition and assess our own efforts in the cold light of those facts.

In addition to the National Potato Board promotion program, there are also state programs. The Idaho Potato Board spent \$7 million on advertising since 1970. Our promotion budget nationally in the same period is a fraction of that.

Let me wind up this analysis of competition by showing you a great opportunity drawn from the same consumer research study on potato consumption shown earlier. Here is an analysis of light and medium users of potatoes.

Meal Occasion Other Starches Served	Light Medium	
	users	users
% of total sample	57	38
Percentage serving:		
Potatoes in some form	51	66
Rice	15	10

Bread	9	5
Noodles	7	4
Pasta	5	4
Macaroni	5	5

Source: U&A Potato Board Study

Look at the increase in pasta consumption among light potato users. Those light users are the target for the Potato Board's 1981 campaign. They are also our prime target. If we can win a bunch of those light potato users over to pasta, we can really impact volume.

In Pastaville our purpose was to get increased financial support from growers and millers who are partners with us in the domestic pasta business and whose fortunes in the U.S. are directly and intimately linked to pasta consumption.

Ever since the creation of the N.D. State Wheat Commission I have been impressed by the potential that body represents in promoting pasta to U.S. consumers. Unfortunately, the Commission and the durum growers it represents have had their sights set mainly on developing export volume. Those efforts, incidentally, have been eminently successful. This year, however, the prospects look different. Quoting from the Wheat Market Review, "Exports of U.S. durum in 1980-81, currently estimated at 75 million bushels, are not expected to reach the record level of 83 million bushels achieved last year."

Nevertheless, the picture is clear in the long term. North Dakota loves to grow durum. They take pride in being pasta's principal raw material. They have not been sold effectively on putting more financial support behind pasta promotion. Pastaville was a major step in that direction, and it produced benefits of which we cannot be fully aware at this time. We are not going to provoke a revolution in thinking in North Dakota overnight. We do have their attention and their involvement to a degree never achieved in the past, and I know Pastaville can be a vehicle increased awareness and support in the future.

We accepted the invitation to address the International Durum Forum to impress durum growers and others in North Dakota that we have an active, effective, professional Association. Pastaville was something entirely

different and got all of North Dakota involved in a great promotion event. It had greater impact on the pasta industry than anything in the past and will bear fruit for as long as it lives.

The durum millers also felt the impact of Pastaville and they have as much reason as we manufacturers to promote pasta consumption. They don't have an export market as do the growers.

Durum millers must have been looking at long range forecasts rather than current results in planning capital expenditures in recent years. Compared to the flat business we have experienced, daily durum milling capacity has gone up 24% in five years and will be up 7% more by 1981, not counting Leonardo's mill at Cando.

The objective of Pastaville was to increase consumption by attracting more money to be used for promotion. The bang we got for buck in Minot was far more than we expected going in, and I believe the continuation of Pastaville will reap further rewards in direct consumer media impact and in achieving greater industry support in the future.

Further work on long range planning will serve to determine the objectives and programs desired by the membership and financial requirements associated with those programs.

As we plan, however, we should be well aware that we are in a war, and the enemy is gaining strength every day. The need for financial resources to fight the battle is clear and unyielding.

Market Prognostication

New winners were announced by Joseph Viviano of the annual market prognostication at the Winter Meeting.

For the third year in a row Elinor Ehrman of Burson-Marsteller has successfully guessed either the durum wheat closing or the Dow Jones average. She guessed a price of \$7.77 for #1 semolina and the market closed at \$7.75.

Angelo Capozzi of Primo Macaroni had the closest guess for the Dow Jones average, 965 versus the actual close of 963.99.

The winners are awarded a large Hershey bar which also has been going up in value.

Time Management

Each day that you live is a precious commodity, and too many people let others write the checks for them on how their time will be spent.

"As you get older, you begin to care less and less what other people think of how you spend your time and what you do."

This statement was made by Dr. Jerry Bell, Professor of Organizational Behavior at the University of North Carolina's School of Business. Dr. Bell was addressing the NFBA Saturday workshop, "Time Management and Personal Development."

Dr. Bell led the participants through a series of exercises designed to impress the value of their time and the relatively limited quantity of time each person has.

He told the Workshop audience to consider how they planned to spend the rest of their time, and suggested they look at it from the standpoint of "will you be satisfied with where you spent it when it is gone."

"One of the most cost-efficient things you can do with your time is to work very very hard - but in a relaxed manner," Dr. Bell told the Workshop.

He also took the group through a series of exercises to relax them. He stressed how important it is to be relaxed and be able to sleep well.

"Sleep is the hidden cost that accounts for most of the waste in management today. When you go to work tired, edgy and nervous, you do not produce.

"You have to learn to totally relax yourself before you go to sleep or your subconscious continues to worry about your problems while you think you are sleeping," Dr. Bell advised the audience.

He also explained to the audience that they must try to recognize the traits of their own personality and then recognize what others do to it.

Dr. Bell's theory, which he tried to impress upon the Workshop audience, is that control of your time comes from within yourself. And once you realize you are the one handling the dispensing of your time, you will realize that you control where it is spent.

MEMBERSHIP SURVEY REPORT

by Dr. Stevan R. Holmberg

The 1980's will bring new challenges and opportunities to the pasta and related industries and the individual institutions engaged therein. In order to ensure that the National Macaroni Manufacturers Association provides programs and services that are responsive to the diverse needs of its members in the 1980's, the Board of Directors initiated the development of a long-range plan under the guidance of the Executive Committee. The Committee, chaired by Lester R. Thurston, Jr., was charged with the responsibility of systematically developing a recommended comprehensive NMMA five-year Long-Range Plan.

The NMMA membership survey represents the first research project designed to provide the necessary information for planning. The general objectives of the membership survey are two-fold. First, it should be recognized that all future related management and long-range planning decisions at NMMA are necessarily linked or related to past decisions. As a result, one objective of the survey was to provide an opportunity to assess the effects of past policy decisions on present NMMA members.

The second general objective of the survey was to provide for direct member input into the long range planning process.

A questionnaire was developed and sent to 111 members as their personal invitation to contribute to NMMA's long-range planning process. In order to broaden the scope of survey participation, a number of copies of the survey were sent to each institution to be distributed to key managers. A highly successful response rate was achieved. A total of 104 completed questionnaires were received, including responses from 58 individual institutions, a 52.3 percent return.

The response pattern to the membership survey suggests an overall satisfaction with NMMA's major program and services. The responses to the open-ended questions seeking a comprehensive assessment of the association and its effectiveness in major program areas were also generally very favorable.



Steven R. Holmberg

Of the 104 members responding to the survey, the greatest proportion were manufacturer members, 72.1 percent. Associate and allied members represented 27.1 percent of the respondents. NMMA is considered to be the primary association membership for 65.4 percent of its members. However, 20.2 percent consider NMMA not their primary association; 5.8 percent are uncertain, and 8.7 percent did not respond. An impressive 75 percent of NMMA's members have been affiliated with the association for fifteen years or longer.

Sales Categories

To the question: "Approximately what proportion of your dollar pasta and related sales were in the following categories in 1979?"—38 macaroni manufacturers responded as follows:

	Grocery Brand	Private Label	Generic Sales	Food-service	Institutional	Military Sales
100%	5.3%	0	0	0	0	0
90-99	10.5	0	0	0	0	0
80-89	7.9	0	0	2.6	0	0
70-79	7.9	5.3	0	0	0	0
60-69	2.6	2.6	0	0	0	0
50-59	18.4	2.6	0	0	0	0
40-49	7.9	5.3	0	5.3	2.6	0
30-39	2.6	7.9	0	2.6	0	0
20-29	0	10.5	0	7.9	7.9	0
10-19	2.6	5.3	7.9	10.5	28.9	2.6
1-9	7.9	10.5	18.4	21.1	18.4	13.2

Growth Rate in Sales Dollars Over Past Five Years

Decline	2.6%
No Growth	2.6
1-4%	13.8
5-9	26.3
10-14	26.3
15-19	0
20% or more	13.2
No Response	13.2

Company Size

In 1979, 7.7 percent of macaroni firms responding had between 1 and 19 full-time employees, while 13.7 percent had between 20 and 49 employees. Firms with between 50 and 99 employees accounted for 6.7 percent of responses. The largest employment size category (100 employees and over) accounted for 56.7 percent. Nonrespondents totaled 15.4 percent.

Future Industry Issues and Trends

NMMA's members were asked to rate (using a six-point scale) the relative importance of 81 possible future industry issues and trends. One open-ended question was included to allow members to identify any other potential issues or trends.

Responses are tabulated on the next page.

Energy, inflation, productivity and sale/advertising of pasta products appear throughout the entire list of future industry issues.

Overall Evaluation of NMMA

The overall evaluation of NMMA by its members was favorable. A total of 67.3 percent "agree" or "strongly agree" that NMMA's services and programs are worth the cost of membership and only 7.7 percent "disagree" or "strongly disagree". However, 19.3 percent were "uncertain" about whether NMMA's services and programs are worth the cost of membership.

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

When you order your durum products from North Dakota Mill, you become part of a team where each member is doing his or her best to insure that your products are the finest available. When you start with the best durum wheat, and mill it with the finest milling equipment, you can't help but win!

Because at North Dakota Mill, we deliver teamwork.

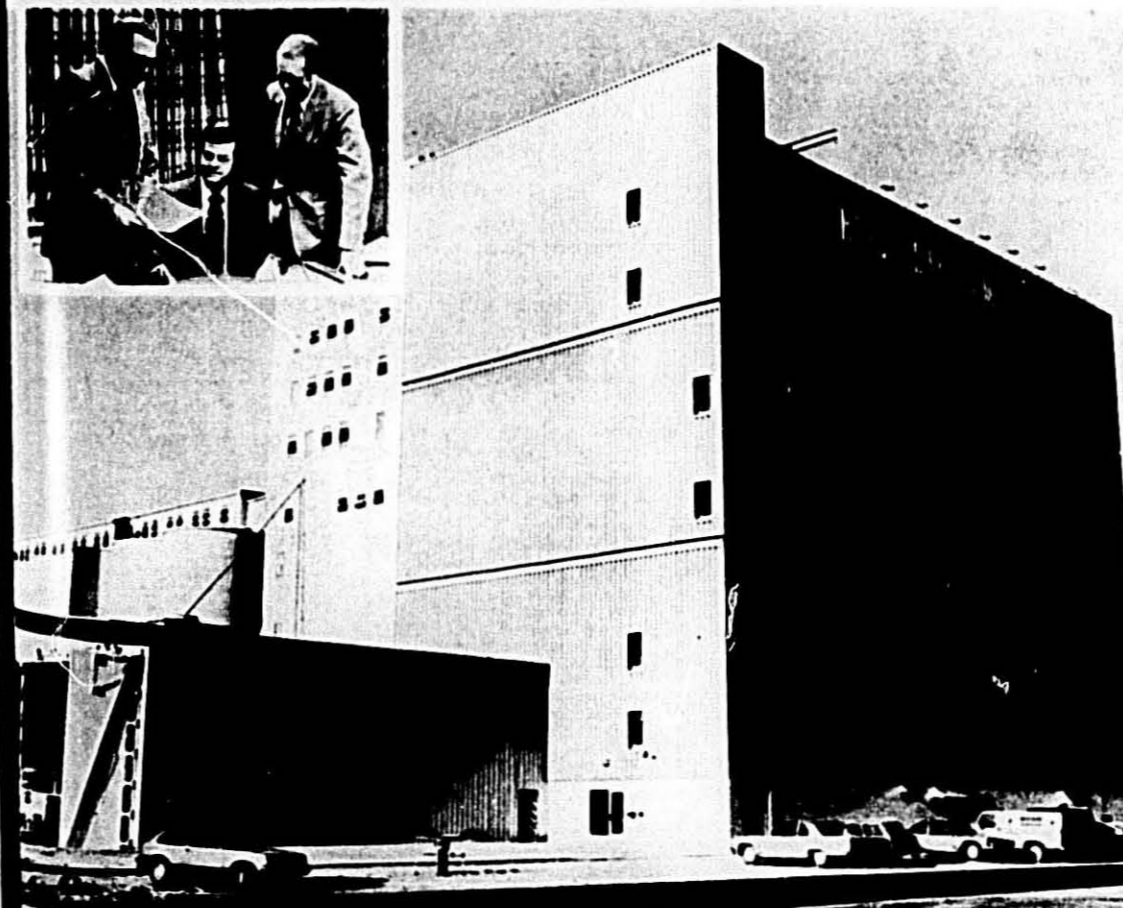
Shown below are three of the North Dakota Mill people working together on some common goals. Left to right: 'Skip' Peterson, Leo Cantwell and Howard Berg.

the durum people



NORTH DAKOTA MILL
Grand Forks, North Dakota 58201
Phone (701) 795-7224

We Deliver Teamwork.



Membership Survey Report

(Continued from page 6)

NMMA is also seen as providing the opportunity for members to participate as fully as they wish to in NMMA activities — 68.3 percent of the responding members "strongly agree" or "agree" with that statement. Approximately 15.4 percent "disagree" or "strongly disagree" and 11.5 percent of the respondents are "uncertain."

The third overall evaluation question concerned the adequacy of NMMA's budget. A total of 26.0 percent "strongly agree" or "agree" that NMMA has an adequate budget to meet the expectations and program needs of its members. Approximately 15 percent felt that the budget was definitely not adequate, while 51.9 percent of the respondents were "uncertain" as to whether the budget was adequate to meet members' program needs and expectations.

Individual Programs

As in the case of the generally favorable overall evaluation of NMMA, members also evaluated NMMA's individual programs positively. However, as should be expected, there was a considerable range between the degree of importance attached to the highest ranked program and that attached to the lowest ranked program. In reviewing these results, it should be kept in mind that some programs are designed to meet the common needs of all members, while others are directed toward specific needs that may be somewhat unique to certain members. Both types of programs are typically essential if associations are to effectively serve the common and diverse needs of their members.

The top five programs rated either "very important" or "important" are: (1) weekly newsletter, 81.7%; (2) standards and nutrition, 75.0%; (3) product promotion program, 72.1%; (4) The Macaroni Journal, 71.2% (5) the agronomy and durum development program at North Dakota State University.

Comments on Programming

NMMA's members were asked to comment on potential new programs or expansion of existing programs. The new or expanded program areas receiving the strongest support were

Rank	Issue	Very Important
1	Major industry problem area will be energy	86.5%
2	The general impact of substantially higher energy costs on the industry will be	85.6
3	Increased cost of transportation	77.7
4	Employee productivity	81.8
5	Increasing consumer acceptance of pasta products for at-home consumption	77.9
6	Major industry problem will be inflation	76.9
7	The ability to attract and retain key supervisory/management personnel	74.9
8	Worker attitudes towards their jobs and management	71.2
9	Electricity availability and cost	71.2
10	Major industry problem will be transportation	69.2
11	Promotion and advertising of pasta and related products	69.2
12	The ability of the grain industry to maintain a high priority energy consumption status	69.2
13	Major industry problem area will be productivity in food manufacturing and marketing	68.3
14	Increasing use of pasta as a convenience food	68.3
15	The ability to attract and retain key technical personnel	68.1
16	Major industry problem area will be general operating expenses	67.3
17	Major industry problem area will be cost of money	67.3
18	Fuel allocation and/or rationing	65.1
19	Improvements in durum wheat	64.4
20	The impact of total deregulation of the common carrier trucking industry	62.4
21	Increasing automation of the manufacturing process	62.5

(1) NMMA should expand end-use consumer product promotion activities, 70.0%; (2) NMMA should expand its retail product promotion activities, 71.2%; (3) NMMA should expand its foodservice product promotion activities, 71.2%; (4) NMMA should collect industry statistics concerning imports by country of origin, quantity, price, etc., 69.2%; and (5) a general sense that, compared with the present, there will be a greater need for NMMA five years from now, 68.3%.

Planning Model

The strategic planning model being utilized by the Association calls for member need analysis along with

external factors analysis to develop planning assumptions, member need analysis statement, external factors analysis statement, and consideration of opportunities and threats.

A strategic audit of the Association involves the current and historical situation to identify and analyze strengths and weaknesses. This done, a mission statement can be made setting forth general objectives, program strategies and data base, and resource strategies and data base. With human resource planning, organization planning, physical facility resources and financial resource planning, implementation strategy can be developed leading to a written Association strategic plan.

NMMA's members' ratings of the importance of NMMA's existing programs and services

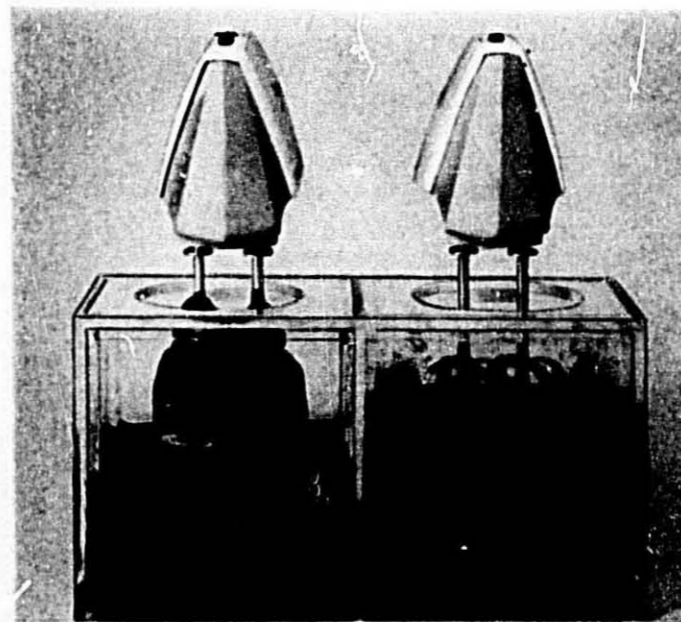
	Percent of NMMA's Members		
	Very Important and Important (4 & 3)	Unimportant and Very Unimportant (2 & 1)	No Opinion (0)
• Summer meeting	51.0%	21.2%	20.2%
• Winter meetings	66.3	8.7	19.2
• Spring Technical Seminar	47.1	17.3	27.9
• Fall Washington Briefing Meeting	45.2	22.1	25.0
• Product Promotion Program	72.1	10.6	10.6
• The Macaroni Journal	71.2	10.6	1.9
• Weekly newsletter	81.7	5.8	3.8
• Pasta Foodservice Manual	59.6	14.4	16.3
• Legal and government relations bulletins	66.3	15.4	11.5
• Agronomy and durum development research program at North Dakota State Univer.	70.2	11.5	10.6
• Foodservice program	63.5	14.4	13.5
• Industry statistics — Ernst and Whinney	63.5	15.4	12.5
• Standards and nutrition	75.0	9.6	7.7
• Film distribution (nutrition film, durum film, etc.)	53.8	25.0	10.6
• Window's Technical Bulletin	48.1	21.2	19.2
• Wage and Hour Survey	58.7	20.2	12.5
• OSHA Bulletin	48.1	29.8	13.5
• Trade relations	57.7	16.3	18.3

THE MACARONI JOURNAL

Our new lubricant won't improve your pasta. Just your profits.

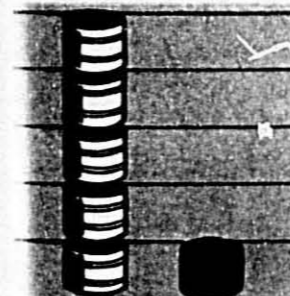
Switching to Demaco's Tech Lube synthetic gear oil from the lubricant you are now using can reduce the amount of power you consume by as much as 15%, and significantly reduce the amount of downtime you experience because of gear-wear and breakdown. It will further lengthen your lube cycles by as much as 500%. It can even decrease the noise your gears make. It has also been approved for use in food machinery by the United States Food and Drug Administration.

Demaco's Tech Lube Series TD gear oils start by clinging to the gears, forming a film with a strength of 100,000 psi and an excellent coefficient of friction. This film remains on the gears even after the machine stops — so it's there when the machine starts up again. The gears are, therefore, fully lubricated during the first 12 seconds of operation, which is when 82% of all wear takes place.



Demaco's Tech Lube clings to the gears even after the machine stops... so it fully lubricates the gears during start-up.

Conventional oils foam and do not cling to the gears... resulting in excess wear.



Demaco's Tech Lube lubricant lengthens lube cycles by up to 500%.

Due to their superior ability to adhere to gears and resist foaming, these new lubricants have excellent heat transfer properties. Most conventional oils actually insulate

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DEMACO is using Tech-Lube as original equipment in all its new machines, and is pleased to be

exclusive agent for these excellent lubricants in the macaroni industry.

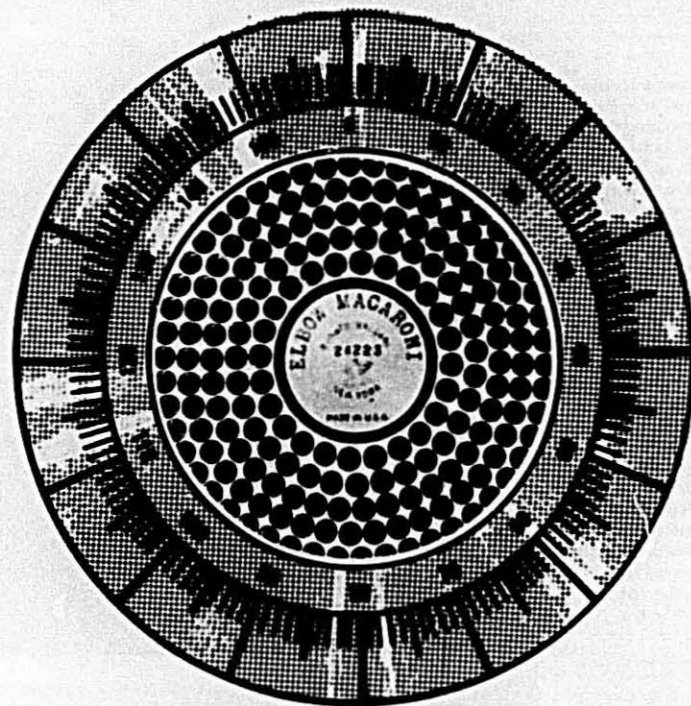
We heartily recommend that you switch to Tech Lube lubricants whether you have our machine or anybody else's.

For complete details call or write Joe DeFrancisci at DEMACO, DeFrancisci Machine Corp., 280 Wallabout Street, Brooklyn, NY 11206. (212) 963-6000.

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MARCH, 1981

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la buonacucina italiana e famosa.

March 1, 1981



Seaboard Allied Milling Corporation



NMMA COMMENTS ON FDA NET WEIGHT LABELING PROPOSALS

by Gary J. Kushner for the Standards Committee Filed January 5, 1981

Hearing Clerk (HFA-305)
Food and Drug Administration
Room 4-62
5600 Fishers Lane
Rockville, Maryland 20857

Dear Madam or Sir:

The National Macaroni Manufacturers Association (NMMA) is the trade association of the nation's leading manufacturers of pasta products. Pasta products frequently are subject to FDA and state and local inspection. Since pasta products are hygroscopic products that are packaged by extremely high speed packing machinery and, therefore, are subject to weight variation due to both deviations caused during good manufacturing practice and loss or gain of moisture during product distribution, FDA's net weight labeling regulations are of particular interest to NMMA's members. Accordingly, NMMA has cooperated with FDA in the development of the instant proposal having testified with respect to the net weight labeling issue in December, 1977, in Atlanta, Georgia.

NMMA supports the agency's efforts to develop a uniform system for net weight labeling compliance to ensure that declarations of net contents on food packages are accurate. It is NMMA's hope that state and local enforcement officials concur with FDA and will exercise their enforcement authorities within whatever strictures result from this rulemaking proceeding.

NMMA offers the following recommendations for refinement of the agency's instant net weight labeling proposal:

- (1) A final regulation based upon this proposal should recognize that pasta products represent a category of foods subject to moisture loss of at least 4%;
- (2) The number of packages permitted to fall outside of the Maximum Allowable Variations (MAVs) should be increased to one when testing thirty samples and two when testing fifty samples; and



Gary J. Kushner

- (3) Federal, state and local inspectors should be encouraged to make special efforts to ensure that all particles are completely removed from packaging material before either the tare weight or product net weight is measured.

These suggestions are addressed in greater detail below.

1. The Net Weight of Pasta Products Should Be Allowed To Vary From State Weight By As Much As 4% To Account For Lost Moisture.

Macaroni (or pasta) products are hygroscopic products made primarily from durum semolina, farina, wheat flour and water. According to the standards of identity for macaroni products, macaroni products must contain a minimum of 87% solids which is equivalent to a maximum of 13% moisture content. Macaroni products generally are packed at the manufacturing plant at a moisture level of 12% to 13%. Since macaroni products are hygroscopic, they may lose some of this moisture during distribution and storage. The amount of moisture loss will depend primarily upon the climatic (humidity and temperature) conditions in which the product is stored.

With respect to its moisture loss propensities, macaroni reacts quite similarly to flour products. This is not surprising since flour and semolina are the principal components in macaroni products. In this regard, flour is likely to gain or lose moisture

somewhat more readily because it is more finely divided than macaroni. However, flour generally is packed in heavy paper bags providing a more resistant moisture barrier than the cardboard cartons in which macaroni generally is packaged (sometimes, macaroni products are packaged in flexible bags). Additionally, flour is packed quite tightly while macaroni packages frequently exhibit more air space. In balance, the more airtight packaging materials in which flour is packed counteracts the greater hygroscopic characteristics of flour making flour and macaroni lose or gain moisture at approximately the same rates.

The moisture loss properties of macaroni products—amounting to, on the average, 4%—have been well documented as a result of several studies conducted during the last 65 years. Copies of these studies were attached. Additional studies are currently underway. When these studies are completed, we will submit the results as a supplement to these comments.

A review of the studies already conducted follows. All of these studies demonstrate that, while packaging materials for macaroni products and retail food store climatic conditions have changed over 65 years, the packaging materials used today are still pervious and the likelihood of pasta products to lose moisture is no less substantial today than it was 65 years ago. In all of the studies to be reviewed below—including the most recent study conducted in 1977—normal retail food store climatic conditions prevailed.

A. 1915 Study By Dr. Benjamin R. Jacobs

In 1915, at the request of NMMA, Dr. Benjamin R. Jacobs, Director of the National Cereal Products Laboratories, Washington, D. C., conducted an investigation concerning the moisture loss propensities of macaroni products. The results of his study were published by NMMA in 1915 in a paper entitled, "Weight Loss In Macaroni, Complete Summary of Scientific Tests and Conclusions For Guidance of the Macaroni Manufacturer."

Dr. Jacobs shipped products packed in five different kinds of packaging materials to eight different localities in order to observe the effect of climate both on the net weight and the moisture level of the macaroni products under study. The products were weighed and were analyzed for moisture content at various points during the study — at the time of packaging, time of arrival at destination, and at intervals of 15 days, 45 days, 90 days and 180 days after arrival. It should be noted that, in 1915, there were not yet standards of identity for macaroni products. Thus, the moisture content of macaroni products was not circumscribed. However, for a variety of technical reasons, even at that time, macaroni was produced at moisture levels varying from 14% to 16%. It is also appropriate to note that, in 1915, packaging materials even more airtight than those used today were utilized—paraffine paper was the most popular.

At the end of 180 days in storage, all of the products under study were found to be in excellent condition with no evidence of deterioration during transit or storage. Of particular significance, all of the products were shown to have lost moisture ranging from 3.60% in St. Paul, Minnesota, a relatively humid climate, to 8.24% in Denver, Colorado, a relatively dry climate.

B. 1922 Study By Robert E. Wilson and Tyler Fuwa

In 1922, the conclusions reached by Dr. Jacobs in 1915 were confirmed by a study conducted by Robert E. Wilson and Tyler Fuwa. The results of their study were published in a paper in the *Journal of Industrial and Engineering Chemistry*, Volume 14, entitled, "Humidity Equilibria of Various Common Substances."

The Wilson/Fuwa experiment exposed macaroni and flour to different relative humidities and demonstrated that macaroni is extremely hygroscopic. Indeed, macaroni was shown to possess a higher water content on a dry basis than flour. The macaroni was shown to gain and lose moisture in a pattern comparable to that of the flour. Again, an average moisture loss of 4%, depending upon the relative humidity of the climate in which the product was stored, was demonstrated.

C. 1956-1957 Study By James J. Winston

In 1956-1957, James J. Winston, Director of Winston Laboratories, Inc. and Director of Research for the National Macaroni Manufacturers Association, conducted a study to determine the percent of moisture in macaroni products in equilibrium at different relative humidities at a temperature of 70 degrees Fahrenheit. A copy of Mr. Winston's results, published in his book written in 1971 and entitled "Macaroni, Noodles and Pasta Products" was attached as Appendix B to these comments.

Mr. Winston obtained two cases of spaghetti packed in cartons (similar to the materials most commonly used for packaging macaroni products, today) from each of two manufacturers. The cases contained twenty 1-lb. packages. Two packages were withdrawn from each of the 20-lb. cases and were analyzed for moisture content using the official A.O.A.C. procedure. The cartons were also weighed on a precision-type of scale with a sensitivity of 0.5 gram and the appropriate carton was used as a tare in each instance. On the average, each package contained approximately 11.8% moisture as packed.

The products under study, still in sealed cartons, were then placed in a LabLine stability oven at different relative humidities—20%, 40%, 50%, 60%, 70%, 80%. At each of the different relative humidities, four cartons from each of the two manufacturers were subjected to each of these climatic conditions for a period of 30 days. The products were then removed and, again, analyzed for moisture content.

Mr. Winston's study again confirmed the hygroscopic properties of macaroni and demonstrated, among other things, that, depending upon the relative humidity at which the product is stored macaroni will lose moisture firms the validity of all of the moisture quite readily. For instance, at a relative humidity of 30%, macaroni containing an initial moisture content of 13% will lose approximately 4%.

D. 1977 San Giorgio Study

Most recently, an experiment was conducted commercially by San Giorgio Macaroni Company. This unpublished study, conducted in 1977, confirms the validity of all of the moisture

data compiled with respect to macaroni products since 1915.

The San Giorgio study analyzed a variety of products stored in a warehouse for a period of 30 days. The climatic conditions under which the products were tested closely approximated standard retail food store conditions with a temperature range of 65 degrees Fahrenheit to 75 degrees Fahrenheit and a prevailing relative humidity range of 30% to 40%. Moisture content was determined by use of a Steinlite moisture apparatus and the products were weighed on a precision scale graduated in 1/4 of an ounce.

The San Giorgio study revealed that, after 30 days storage, products packed in sealed cartons and in sealed cases in a warehouse lost as little as 2.3% moisture where the original moisture content was 11.2% and as much as 4.3% moisture where the original moisture content was 12.7%. A copy of this study's results was attached as Appendix C.

While it is not possible to predict precisely how much moisture a given product will lose, it is clear that macaroni products are extremely hygroscopic and, on the average will lose approximately 4% moisture after storage for a relatively short period of time. They will lose moisture comparable to that of flour packed in kraft paper bags. Accordingly, a 4% variation allowance to account for lost moisture in macaroni products is justified. We, hereby, request that the agency consider these comments a petition for such an allowance if this is deemed appropriate.

II. Larger Deviations From MAV's For Sample Sizes of Thirty and Fifty Should Be Permitted.

Another area of concern with the instant proposal as it relates to pasta manufacturers involves the sampling techniques utilized. In particular, NMMA fears that the rigidity characterized by the extremely limited number of samples permitted to fall outside of the established Maximum Allowable Variations (MAVs) suffers from technological infeasibility. Accordingly, it is NMMA's recommendation that a larger number of samples be permitted to deviate from the established MAVs, at least when large samples are taken.

(Continued on page 16)



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Net Weight Labeling

(Continued from page 14)

Currently, the proposal would require that, for sampling of ten samples or thirty samples, all samples fall within the MAVs established in revised Handbook 67. When 50 samples are taken, one sample would be permitted to fall outside of the established MAVs.

NMMA always has endorsed the concepts embodied in National Bureau of Standards Handbook 67. Indeed, it has been NMMA's position that adoption by state and local authorities of those concepts will lead to more uniform and equitable enforcement of the net weight labeling regulations. The limited deviation permitted from the MAVs as set forth in the current proposed regulation, however, are inadequate when you consider that pasta products are all mechanically packed by highly automated equipment. Some packaging lines pack as many as 180 packages per minute. Even though most macaroni manufacturers utilize very expensive and highly precise checkweighers which reject underweight packages, even high speed, precision equipment is bound to generate some weight irregularity. While the proposed MAVs, themselves, consider this potential irregularity, additional flexibility is both necessary and appropriate.

Therefore, NMMA suggests that, in testing thirty samples, one package should be permitted to fall outside of the established MAVs. In testing fifty samples, at least two samples should be permitted to deviate from the MAVs.

III. Inspectors Should Take Extra Care To Ensure That All Adhering Macaroni Particles Are Removed From Product Packaging Materials Before Net Weight Compliance Is Assessed

Finally, NMMA endorses the use of a "dry" tare in assessing net weight compliance. NMMA recognizes, however, that some particles of a product may adhere to the inside corners and other parts of packaging materials as a result of attrition during packaging. Since any article adhering to packaging materials are still part of the packaged product and, clearly, are edible, inspectors should take special care to ensure that all particles are

thoroughly removed from packaging materials before net weight assessment is made. It should be noted that even the smallest particles of a product such as macaroni can make a significant difference in the product's net weight.

NMMA appreciates this opportunity to comment and looks forward to continuing to work with the agency toward the development of a uniform, equitable, enforceable and, most importantly, technically sound net weight labeling scheme. The suggestions offered herein, if implemented—especially that dealing with moisture loss—should bring the agency closer to satisfying its goal.

Sincerely,

Gary J. Kushner
Counsel to the National
Macaroni Manufacturers
Association



James J. Winston

James J. Winston Feted

A testimonial dinner honoring James J. Winston, president of Winston Laboratories, was tendered by the Scientists Division of UJA-Federation on Wednesday, February 25th, in New York City, it was announced by professor Amos Turk, chairman of the division.

Dr. Frances Krasnow Thau is co-chairman and cash chairman of the division. Serving on the executive committee are: Dr. Liese L. Abell, Lila K. Agree, Nechama Ariel, Dr. Julius Belford, Dr. Ronald L. Birke, Dr. Judith Goldberg, Dr. Frances Gruen, Ray Gussman, Benjamin Kritz, Dr. Leon Lachman, William Lebowitz, Ronald Mirman, Dr. Murray

Oratz, Dr. Bernard L. Oser, Dr. Tovia L. Rome, Milton Rosen, Evelyn Sar-noff, Bernard Wager, Dr. Irving Wal-cher and Marvin E. Winston.

The guest speaker was professor Rolfe H. Herber, Department of Chemistry, Rutgers University. Professor Herber spoke on "Collective Phenomena and Individual Response."

Mr. Winston, who is also director of research for the National Macaroni Manufacturers Association, has been involved in research and the food field for almost 50 years. During that time, he has helped to establish standards of food production, nutritional content and sanitary conditions for a wide variety of products. He has worked closely with the U. S. Food and Drug Administration regarding its regulations and requirements for such items as dried egg materials, meat, fish and other foods.

He is the author of a basic industry text on food production and quality control and has written for leading scientific journals. A fellow of the American Institute of Chemists and other scientific and technical societies, he has been awarded a Certificate of Public Service by New York State and received a tribute from North Dakota State University for his many years of service with its Cereal Chemistry and Technology Industrial Advisory Committee.

With Israel confronted by massive additional economic burdens as a result of the peace treaty with Egypt, the UJA-Federation Campaign aims this year to increase greatly the funding it supplies for humanitarian services to Israel's people. The Campaign also seeks to raise the level of aid it provides to endangered, oppressed and needy Jews elsewhere overseas in a period of growing turmoil and pressure upon Jews in a number of countries, and to the New York Jewish community's own needy and distressed in a time of continuing decreased governmental funding for essential social services.

More Taking Out, Fewer Paying In

An analysis by Martin Lefkowitz of the U.S. Chamber of Commerce shows there are 81.5 million recipients of federal payments and 78.9 million workers in the private sector.

THE MACARONI JOURNAL

ASEECO

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NMMA PUBLICITY AND PROMOTION
 by Elinor Ehrman, Vice President/Senior Counselor
 Burson-Marsteller, New York City

The pasta industry has had a public relations program since 1948 when the National Macaroni Institute was created as the promotional arm of the National Macaroni Manufacturers Association. That year the industry retained Theodore R. Sills & Company, a Chicago-based public relations agency with both trade association and food know-how, a combination that was difficult to find in those days. Ted Sills had just opened an office in New York City, had installed a home economics test kitchen, and was well on his way to developing the country's top public relations agency specializing in food.

During the 30 year span that I personally have been involved with the pasta business, publicity and promotion have changed just as much as other phases of the macaroni industry.

Consumer is our Target

With the funds available to us, our target audience has always been the consumer — the homemaker, the housewife who did the shopping, fed her family, and planned the parties. We put together new ways of serving macaroni, spaghetti, egg noodles — (by the way, only recently have we referred to pasta as PASTA, because we were slightly paranoid that pasta came across in translation as p-a-s-t-e.) We emphasized all of pasta's many attributes . . . stressing the product's economy during hard times; promoting convenience for people in a hurry; nutrition for growing families; low-calorie recipes for those on a diet; ethnic dishes for versatility. We've been responsible for literally tens of thousands of recipes; thousands of photographs, and weeks and weeks of air time on both radio and television devoted to pasta.

The wonderful, truth about publicity is that a good promoter must keep in tune with the times . . . with lifestyles, trends, new product entries in food and fashion. You name them, and we've been there.

In the past few years, pasta has become the "in" food with people of all ages, ethnic background, sex, color, income. The slimmest model, the browniest athlete, the city career gal,



Elinor Ehrman

the suburban matron; Julia Child, Jim Beard — restaurant operator or party caterer — all are PASTA freaks, and pasta promises to be the food vogue of the decade ahead.

Objectives

And so it is in 1980 we address ourselves to the overall goal of increasing pasta sales via a Communications Campaign with these objectives:

- reinforce consumer recognition of pasta's many merits;
- promote pasta as an inexpensive source of nutrition;
- stress importance of purchasing American-made pasta for the best in quality.

Our strategies for this year's campaign:

1) A Basic Consumer Education program "Pasta Means More for Less" playing up today's hot buttons of

- MORE nutrition
- MORE convenience
- MORE versatility
- for
- LESS money
- LESS time
- LESS calories

2) A mini-campaign, "Pasta . . . Food for Athletes", with emphasis on complex carbohydrates and pasta's value to sports of all kinds: football, basketball, skiing, tennis, baseball, jogging, bicycling, swimming, hiking.

Publicity in 1979-80

In calendar year 1979 we totaled 118 major stories on PASTA in con-

sumer magazines, reaching a total circulation of 385 million. Our box score for the first 10 months of 1980 indicates that we are keeping up last year's pace.

Here are some highlights and spectacular results in the first six months of 1980:

Our first break was with Good Housekeeping Magazine with a circulation reaching more than 5 million homemakers in the 35 and older age group. The February issue ran its Big Pasta Cookbook cover story of "50-Plus Ways to Eat Pasta — Plain or Fancy, Sauced or Stuffed, in all shapes and sizes — all absolutely delicious!" There followed eight full-color pages of pasta dishes and 24 recipes, plus quick serving tips. No longer does pasta mean just spaghetti.

A readership of close to 2 million weight watchers read in the March, 1980 issue of Weight Watchers Magazine . . . "Live-it-up Pasta Meals!" which lend "delicious zest to your meal plan as you lose weight. A low-fat food and a good source of protein, pasta can be enjoyed on your weight-loss program." Nine recipes are included as well as calorie count.

Another 25 million homemakers in the older than 35 age group read the April issue of Woman's Day in a color feature geared to convenience of pasta — "Make Two, Freeze One!" — along with microwave reheating instructions.

Woman's Day Cookbook Magazine, Simply Delicious Meals in Minutes, out this summer, featured a 12-page section entitled: "Pasta Potpourri" which carried an NMMA color photo. Two pages were devoted to "Which Shapes to Buy, How Much to Buy, How Much to Cook, How to use Leftovers, Basic Cooking Directions." 24 recipes — each with menu. Circulation: 900,000.

July's House Beautiful was read by approximately 2 million upscale homemakers who do a lot of entertaining. Blowup reads: "Remember when pasta meant just plain spaghetti? Today, it's a whole new world of shapes, sizes, textures, even flavors.

People are eating it more and more often — and nobody's calling it fattening."

Modern Bride

Our placement in a summer issue of Modern Bride is entitled "Let's Cook Italian." This feature which credits NMMA runs three pages. "Pasta is the staple dish of Italian Cooking. Entertain your guests with a show-off entree."

And reaching the pre-bridal market in Seventeen's July issue is this ratatouille party dish made with macaroni bows. Circulation: 1,450,625.

August's Redbook, the favorite magazine of young marrieds, addresses the economy of pasta with "New Price-tag Recipes for Pasta." Blowups read:

1) "The hand that holds a fistful of pasta over a pot of boiling water holds the makings of an infinite variety of marvelous meals — from quick, plain and very inexpensive dishes to rich company concoctions."

2) And also Nutrition. "Pasta consists mostly of carbohydrate, some protein, and very little fat. The carbohydrate found in pasta is a 'complex' carbohydrate and is nutritionally more beneficial than simple carbohydrates such as those found in granulated sugar." 14 recipes. Circulation: 4,039,951.

The August issue of Working Woman, one of the new magazines to reflect today's living, adapts pasta to the lifestyles of its more than 1 million readers and shows how to fit good food into a tight schedule.

And, finally, today's glamorous Cosmopolitan readers, some 6 million strong, found in the October issue that they could keep their beautiful figures as they still eat pasta.

If your mouth waters at the very mention of palate-pleasing pastas, here's good news: a meal-sized portion tossed with light and luscious sauce will cost you fewer than 300 calories! So start the water boiling and read on!

In line with our mini-campaign, "Pasta . . . Food for Athletes", we had this placement in Family Weekly Sunday Supplement on February 17, entitled "Foods from the Winter Olympics" highlighting pasta as a complex carbohydrate food for sports enthusiasts. Lead-off recipe is our chicken noodle soup. Family Weekly

appears in 352 newspapers with a total circulation of 11,942,602.

The New York Times paid the definitive tribute to pasta's progress in the world of gourmet foods . . . "Making the Most of Pasta": "If we had to make a list of the major developments in American taste within the past decade, it would most certainly include the discovery that there is more to Italian pasta than spaghetti and lasagne with tomato or meat sauce."

Newspaper Color Pages

Newspaper color pages is another avenue for featuring pasta.

Dallas Times-Herald highlights low-calorie pasta dishes, "the spaghettis, linguinis, and the lasagnes of the world want their reputations cleared. They are not the villains responsible for Dallas' bulging waistlines. The only thing they stretch is your budget." Circulation: 241,208

A two-photo feature in the Daily Oklahoman features versatility, while The Birmingham News features economy.

In the category of newspaper syndicates we hope to wind up 1980 with pasta breaks to equal last year's number of 155 with a potential circulation of more than 1 billion. Three placements ran this period in the Newspaper Enterprise Association food pages with circulation of 25 million each. Each ran with one of our photographs and "Pasta" headline geared to versatility, convenience and economy.

Two other syndicates — Associated Press and King Features — stressed economy and nutrition.

Major market newspapers, Houston Chronicle, Mobile Register, Knoxville Journal, Providence Journal, Columbus Dispatch, St. Louis Globe Democrat, and Cleveland Press, cover leftovers and budget stretchers.

The grocery trade press is constantly alerted to our pasta campaign themes. Store operators are reminded that "Pasta Means More for Less" and pasta's sales impact on related items. A recipe for Spaghetti with Meat Sauce illustrates how a \$1.00 purchase of spaghetti sells \$10.07 in related foods such as tomatoes and herbs, onions, cheese, and beef.

National Macaroni Week

National Macaroni Week has for many years been a key promotion in

the consumer press. Our campaign theme with appropriate feature materials went to all media in celebration of this event October 2-11, 93 television stations across the country used this program kit to herald the event. And well-known food show personalities in major market areas demonstrated for viewers these recipes:

● Baked Noodles with Spinach and Yogurt — photographed in the gift casserole which was sent to each show personality. A durum wheat design is on the bowl.

● Macaroni-chicken dinner; spaghetti with vegetables; spaghetti with tuna and broccoli.

This is a small portion of our national coverage on pasta in the consumer market. Supporting our major themes is a variety of collateral: cook booklets; leaflets; recipe sheets which are offered to food editors and opinion leaders in "grass roots" areas as well as major markets. This is a sampling of currently available material.

Newest leaflet is "Pasta . . . Food for Athletes" which I hope you've seen all around Pastaville, USA, since we made this the theme of our store display contests in honor of pasta. This same leaflet has been offered nationwide in supermarket outlets to emphasize the role pasta plays in energy-demanding sports as well as in general nutrition. It is also being offered in such publications as Athletic Training and other magazines read by sports specialists.

Foodservice

In December, 1976, we were given an added assignment with additional budgeting to promote pasta to the Foodservice Market. This area had previously been handled by another agency. Our efforts were targeting in the first two years to achieving pasta visibility in foodservice magazines read by the major segments of this market serving restaurants, hotels, fastservice outlets, hospitals, schools. We soon realized the need for a major educational tool to tell operators of these foodservice outlets how pasta could help them boost profits, as well as provide an important contribution to the nation's nutrition.

Our answer was a Pasta Foodservice Manual. This is a unique document.

(Continued on page 22)



the Pure. Golden Color of Quality

Peaves Food Group is a leading manufacturer of high quality semolina and durum flour. Our products are made from the finest wheat and are available in a variety of sizes and grades. We are committed to providing our customers with the highest quality products at the most competitive prices. Our facilities are state-of-the-art and our processes are strictly controlled to ensure consistency and quality in every batch. We are proud to be a part of the Peaves Food Group family and we look forward to serving you for many years to come.

King Midas Semolina and Durum Flour
Quality with a running start on all the others



Peaves Food Group

Publicity and Promotion

(Continued from page 19)

ment, the first of its kind, to position pasta as a sales tool to the foodservice industry. The Manual goes back to pasta's roots, as it were, and durum wheat, semolina, its many shapes, how it should be cooked, stored, merchandized. Always the bottom line pointed out pasta's cost efficiency, its menu price flexibility, its profit power.

Distribution of the Manual began this spring. We distributed only 250 Manuals on a complimentary basis to foodservice executives and marketing directors of major contract feeders, fast food chains, airline feeders, 50 state colleges/universities. In addition, we distributed the Manuals directly to our contacts in the foodservice press and to members of the NMMA.

This initial distribution generated requests for hundreds of additional copies which we have sold for \$10 which covers printing, postage, and handling costs.

A profile of these orders includes such outlets as: Mamma Leone's, Piza Hut, Charlie O's, Long John Silvers, Lexington, KY, Zorba's Pizzeria, Ana Maria, FL, Poor Boy's Steak House, Clovis, NM, Pizza Villa, Janesville, WI, The Concord Caterer, Burlington, MA, Antonio's, Simsbury, CT, The Old Spaghetti Warehouse, Dallas, TX, Guiseppi's Italian Station, Abilene, TX, Everybody's, Inc., Atlanta, GA, University of San Diego, Esso Travel Center.

We continue to distributed Manuals requested in reader columns of foodservice magazines to a broad-spectrum market.

Our first major placement was this one in Michigan's Food and Beverage, a monthly magazine with a circulation of more than 16,500 restaurateurs in the state of Michigan. "Pasta Means Profit" captions the photo of spaghetti on the February cover. The editor has reproduced our Manual word for word in a photo offset version on special pasta paper. He prologues our chapter titles with: "During the next nine months, Michigan Food and Beverage will publish the information listed below. Remove the pages and place in a loose leaf binder for your files and consideration."

A significant placement was the story entitled "Pasta Plus" which ran

in the May issue of Restaurant Business, a national publication with a circulation of 70,000 reaching operators serving 30 million meals per day. This major seven-page feature repeats a large percentage of the information in the Manual. It zeroes in on the versatility of pasta, its nutritional and economical value, as well as our cooking, storage, and yield data. Brief case histories are incorporated of how various restaurants merchandise pasta for profit.

School Food Service Journal, September issue, a major trade magazine, gave the Manual a full page feature. This feature is headed with a credit to NMMA, Durum Wheat Institute, and North Dakota Wheat Commission. An overview of the Manual tells about the various wheats pasta is made from, gives cooking directions, storage and reheating directions. Additional mention is given to the illustrations, charts for portion control, calorie counts, and cost/yields as being an "easy and organized reference." Circulation: 54,820. Meals per Day, 45 million. We have already had 368 inquiries from this insert.

"The Wonders of Pasta" headlines the cover of Food Management magazine for September, 1980, with an enlarged pasta shell dominating the dramatic full color cover. The cover is only the beginning of the pasta story - 6 full inside pages, two and one-half in full color, are devoted to pasta with an additional six pages offering 15 new pasta recipes.

Confirming the value of the information included in the Manual is a description of the four types of pasta, nutrition information, and cooking directions. Circulation: 49,748. Meals per Day: 34,013,000.

Educational Program

Supplementing our agency's work with the media is the educational program which the NMMA handles through Bob Green. Still in distribution is the industry film "Durum... Standard of Quality", a real classic and one of the best of its kind which was produced by the growers in the mid-60's. "Macaroni, Nutrition, and Numbers" was another motion picture which the growers filmed in the early 70's to explain the nutritional information on the packages of enriched macaroni products. These films are tar-

geted to classroom use, and together garner well over 1,000 showings per year.

Two filmstrips are also in distribution, both developed by the Durum Wheat Institute: "Tricks & Tips with Macaroni Foods" is circulated specifically to Home Economics classrooms; "How to Cook Macaroni Foods" is targeted to Foodservice outlets and training schools.

Special Projects

What I have just described are the basic programs which we carry out over a year's campaign in both consumer areas and foodservice outlets. This is the backbone of any food publicity program and offers the foundation for any special add-on projects.

One such project, which we've repeated now for quite a few years, is the industry's press luncheon in New York City which is held in Tiro A. Segno, the excellent private Italian eating club in Greenwich Village with a staff of chefs sensitive to serving pasta "al dente". All the greats and near-greats in the world of food have been our guests at this landmark luncheon which has become a tradition to food writers for major magazines, newspaper syndicates, cookbooks, daily newspapers, cooking schools, radio, and television.

Not only does the press receive new food ideas for pasta, but it has the opportunity to meet one-to-one with industry leaders, including the CEOs of major macaroni manufacturing companies coast-to-coast, as well as representatives of millers and growers.

A brief glimpse of the going on this past September at the 14th Annual Macaroni Family Reunion shows that approximately 100 guests at attendance, including both press and hosts. Large tables of six to ten permit guests to learn industry news firsthand as they enjoy their pasta.

Spaghetti Safaris

Over the years we've had some exciting special projects for pasta not the least of which were the Spaghetti Safaris - I in the 60's and II in August, 1977, which took place when industry leaders among growers, millers, and manufacturers joined forces to put together a massive educational program for food editors of leading press outlets. American Home, Better

(Continued on page 24)

THE MACARONI JOURNAL

WINSTON LABORATORIES, Inc.

EST. 1920

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MARCH, 1981

Publicity and Promotion

(Continued from page 22)

Homes & Gardens, Family Weekly, Good Housekeeping, Lady's Circle, Seventeen were among national publications who sent editors to cover the event.

Special collateral was developed including a Pastaport of scheduled events; a pith helmet to protect city folk from the hot sun which turned out to be not so hot after all; a complete press kit with handmade cover of safari cloth which included new photos, copy, and recipes; a "corn dolly" made from durum wheat as a cherished artifact of the trip; special menus from the Minneapolis Club; samples of grain from the mill; and probably most prized of all, sheaves of durum wheat newly swathed and collected for fall bouquets by the editors themselves.

Some highlights were the take-off in our chartered plane from the Minneapolis airport for Medora and a pitchfork fondue barbeque atop a mountain overlooking the Badlands.

Viv Wright, our hostess in Edmore, and her food committee outdid themselves with the pasta picnic buffet lunch. We visited the wheatfields to ride combines and observe the wheat being swathed. The local North Dakota press gave us front page treatment along the way.

Results of the Safari were:

• Dorothy Polson, food editor of the Phoenix Arizona Republic in true reportorial style produced a complete food section of the Safari with pages of photographs, copy, and recipes.

• Marilyn Hansen devoted two Sunday features to pasta products. Her economy cover story, "Money-Saving Pasta Dishes" used our photograph and seven recipes.

• Mildred Ying, food editor of Good Housekeeping in December and January issues included pasta products in two major color stories.

• Adelaid Farah gave a strong nutrition plug to pasta. Her copy accompanying a two-page color spread followed by nine of our recipes complete with calorie count was in January's Family Health. Pasta Pointers are directions on how to cook pasta and quote the National Macaroni Institute.

• Better Homes & Gardens' Doris Eby put pasta on the February cover

and inside color page in a feature on "How to Jazz Up Everyday Food."

Pastaville

And now we come to Pastaville, USA, the first, we hope, of many Pastaville USA celebrations. Despite a late start, only two months to prepare for an event which we hoped would generate national publicity, we've done well.

In mid-October, the Pastaville, USA story and program of events was sent over the UPI Wire Service with a New York dateline to hundreds of member papers nationwide. It ran in the Salt Lake City Desert News, the Cleveland, Ohio, Press, the Peoria Journal Star, and Van Nuys, California Valley News — as well as local North Dakota papers. UPI radio picked up the story, and Dennis Hill was interviewed on a live broadcast from San Diego.

The Speediest Spaghetti Slurping Contest got a boost from a photo which ran with Pastaville, USA story in the NEA story in the NEA Picture Service Syndicate.

On October 29 Les Thurston responded to a phone-in interview with the Fargo Forum.

On Thursday, November 6, Bob Howard made a special trip to Fargo where he appeared in 10-minute tapings on NBC, ABC, and CBS affiliate shows broadcast throughout North Dakota.

On Friday, November 7, Pastaville USA got a salute on the Today Show when Willard the Weatherman showed off his PASTA key to the city of PASTAVILLE.

On Saturday, November 8, Associated Press sent a reporter and photographer to cover the Pastaville events of Rigatoni Run, Slurping Contest, and Spaghetti Spiel.

Throughout all these events local newspapers were on tap, and local television stations did special pre-week featurettes on the Slurping Contest, the Run, and other events.

Special footage of the festivities has been tailored for the Turner Cable TV Network, to be shown on all their News Subscriber stations.

Both NBC's News Program Services and CBS's Closed Circuit TV wire services are scheduling wrap-ups of PASTAVILLE, USA for use at will by all outlets.

A Talk to Food Editors

While income continues as a major factor in food consumption habits, time has replaced it as the "limiter" for most Americans. E. Robert Kinney, chairman of the board and chief executive officer of General Mills, Inc. said in an address at the 1980 Newspaper Food Editors Conference in Minneapolis.

In welcoming the newspaper food editors to "An Evening at General Mills" at the company's headquarters offices, Mr. Kinney pointed to major changes in eating patterns, including an increase in the need for convenience foods, a growing interest in health and physical well-being and an increase in eating away from home.

Constant Change

"Consumers want different things today from what they wanted 10 to 15 years ago," Mr. Kinney said. "Furthermore, there is little doubt that they will want different things five years from now than they want today."

Mr. Kinney pointed out that General Mills "devotes millions of dollars to learning what the nation's men, women and children are thinking and planning, how their lifestyles are changing, how they are acting in the marketplace."

"With the sophisticated tools of marketing research, we probe the thinking of more than a quarter of a million people every year. We continually study the economic and sociological environment, and we draw on the resources of the Betty Crocker Food and Nutrition Center, with their thousands of contacts annually."

Mr. Kinney explained that since 1974, General Mills has commissioned American Family Studies to explore views and actions of families.

"Now," he continued, "we have commissioned the research firm of Louis Harris and Associates to conduct a study on the impact of work and a changing workforce on the family and changing family priorities on the workforce."

Stability and Persistence

Despite changing consumer wants and needs, Mr. Kinney said, "there is a great deal of stability and persistence in the way Americans eat."

"Food habits are difficult to change."

This is especially true in certain categories where, years ago, superb products were developed which uniquely satisfied consumer needs." Mr. Kinney cited several products as examples, including some basic General Mills products, including Gold Medal flour, Bisquick, Wheaties and Cheerios. At the same time, he emphasized, the extraordinary growth of yogurt is an example of how eating patterns change and consumers develop new wants and needs.

"Clearly, affluence is one of the factors affecting eating patterns," Mr. Kinney said. "As a nation, the U.S. is wealthy. Most of us have enough income to be able to make choices in food. Although income is traditionally the limiting factor in food consumption for many, time, for most Americans, has now replaced it as the limiter. With the number of women in the work force increasing almost daily, with the number of working mothers climbing dramatically, time is at a premium."

Mr. Kinney pointed out that all time limitations are not related to demands of work. "People wish to spend their time, the stuff of which life is made, in whatever way is meaningful to them — whether it be selling or sailing, running or resting," he said. "This desire to do one's own thing has perhaps reached a zenith in this country today. Although individualism has always been prominent in each of us, in today's society it is emerging to a greater degree than ever before."

"Young and old alike say, 'I am different. I want to live as much as possible by my own rules.' Individuality probably accounts for the success of so many varieties of ready-to-eat cereals. It may account for the current love affair with salads in a variety of forms."

New Products
Mr. Kinney said that General Mills, drawing on continuing studies of consumers, "seek to identify products that will be successful in consumer service and successful for General Mills." He cited the following as products "which we hope will be winners in the 1980's."

"Our latest entry in the cereal market is Crispy Wheats 'n Raisins. It is the first product to offer raisins

with a cereal other than bran. It consists of crisp wheat flakes, with soft plump raisins. It is fortified to 25% of the U.S.R.D.A.

"We are introducing Granola Clusters nationally as a companion to our highly successful Granola bars. Convenient for people on the run, they are a portable food with natural ingredients and nougat centers surrounded by granola."

"For people interested in weight control, we are testing Light Style Cake and Frosting mixes. They contain one-third fewer calories than traditional layer cakes, yet have no artificial sweeteners. Part of the secret is a shortening blend with a reduced amount of sugar."

"For snackers who are looking for something different, we are testing Fruit Roll-Ups, a snack made with real fruit."

Mr. Kinney also cited product improvement "to keep abreast of evolving consumer taste" as well as the company's expansion in the restaurant business.

Food Prices

"As we try to serve consumers as they wish to be served," he added, "we are well aware of the universal concern for food prices. Inflation and its impact on what we buy and particularly what we eat is a problem for most people."

"Frankly, the outlook for food prices in the next two or three years is not encouraging. As costs of what goes into producing food continues to rise, they must be reflected in what we all pay at the checkout counter. Generally, all prices for food are expected to increase about 8% in 1980, 11% in 1981 and 10% in 1982. Even so, food is still a relative bargain in this country. Today, it takes only 16½¢ of the average person's dollar of disposable income, the lowest amount of any nation in the world. As consumer income grows, consumers' food expenditures should require an even smaller percentage."

Mr. Kinney announced that the company's corporate planning department and Betty Crocker Food and Nutrition Center are preparing a series of quarterly bulletins for distribution to newspaper food editors presenting facts and insights about the consumer of the 1980's.

Time-Life Pasta Book

Time-Life Books, Alexandria, Virginia, has a new one out on Pasta — The Good Book. Techniques and Recipes.

Pasta is called "an esteemed staple" in the introduction which names noodles, couscous, dumplings, wontons, macaroni, rigatoni, spaghetti, tubetti, vemicelli, fettucini as a few of the many varieties of pasta. A primer of shapes is given with international variations. Recipes for three basic sauces include white sauce, tomato sauce, and meat sauce.

Chapter 1 cover making fresh pasta, "a simple art with rich rewards." Filling pasta packages is the making of raviolis.

Chapter 2 deals with boiling, poaching, and steaming — tenderizing with liquid. A casing of coiled macaroni illustrates the spectacular molding of long macaroni.

Chapter 3 is about baking — melding flavors in the oven. Macaroni and cheese, lasagne, cannelloni are among the classics.

Chapter 4 tells about frying — a range of unexpected textures. Fried noodles, crusty chow mein, fritters and croquettes utilize noodles in unusual ways.

Chapter 5 is about dumplings — ensuring a proper puff to pillowy accompaniments leavened with yeast.

There is an anthology of recipes, a recipe index, as well as a glossary and recipe credits which includes one of the best sources for recipes we know of. Profuse with illustrations and step-by-step instructions, the book is a tremendous work.

A Pasta Foodservice Manual containing

- (1) Pasta as a Sales Tool.
- (2) What Is Pasta? Some Definitions.
- (3) Pasta Categories and Shapes
- (4) Packaging, Storage, Cooking Directions
- (5) Food service Equipment and Pasta Preparation.
- (6) Nutrition and Calorie Counts.
- (7) Cost/Yields of Pasta Products and Trade-up Tips.
- (8) Merchandising Pasta
- (9) Pasta in Trade and Foodservice Media.

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MARCH, 1981

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Noodles by Leonardo

Jim Baccus, staff writer for the Fargo Forum, had a full page feature with pictures recently on the mill and macaroni plant at Cando, North Dakota.

Noodles By Leonardo is a company in a hurry. Groundbreaking took place August 16, 1979. The building was up by Christmas and machinery from Italy and the U.S. was flowing in. Pasta production began last fall and now they are working to get the mill started up.

Head miller is Tim Dodd, age 28. He is a former employee of International Malting Foods, Kansas City. His wife, Mary, is quality control supervisor. She formerly worked for ADM.

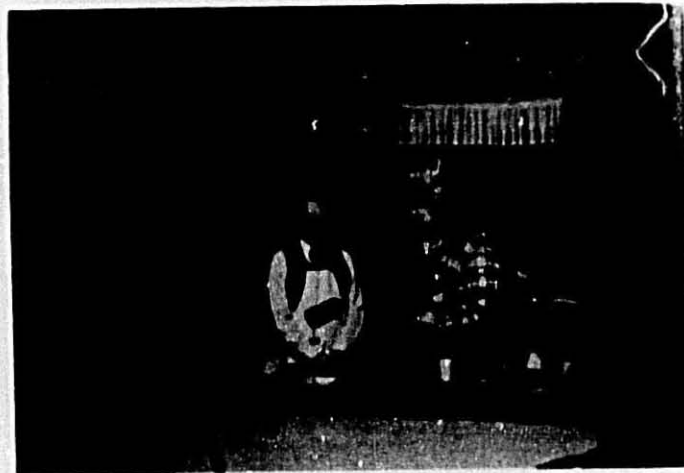
At 56, vice president Jerry Mohr says he's been in all phases of the business, including manufacture and sales of pasta-making machinery. His production and control supervisor, Wilmar Hegener, has been in the business 33 years.

Recently the plant moved to two 8-hour shifts, packing in ten hours what the lines produce in 24. The plant has 55 employees. When it is rolling at top speed, it will employ about 150. Distribution to date is in North Dakota, Minnesota and Wisconsin, but management is confident their products will become available nationally.

Mohr says the plant is an extension of the driving energy of its owner, Leonard Gasparre, a Minneapolis developer. Gasparre is reported to be negotiating with banks for a new pasta plant and mill in Langdon, North Dakota and eventually plans to operate five plants in the state.

Cando loves pasta—and the pasta mill and factory.

"This new development has meant a great deal to Cando and the whole area," says the Rev. Lambert Studzinski of the Sacred Heart Church. "Look, it's boosted the churches' population in this ecumenically-minded town," he says. "We've invited Jerry Mohr to speak about the plant at the next meeting of the ministerial association." As Noodles by Leonardo's public relations man and as the enterprise's most enthusiastic spokesman, Mohr will go.



Spaghetti for breakfast! That's what John Westerberg, president of the Creanette Company (left), was telling viewers and Gary Schendal (right), when he went on the nationally syndicated "Country Day" television show on January 27. John prepared several of his favorite Creanette recipes for early morning viewers on the 30 stations in the Country Day network and offered those writing in free copies of "John's Favorite Recipes". Creanette Company is one of the nation's oldest and largest full line pasta companies and has the widest distribution of macaroni products of any company in the world.

Super Bowl

Couldn't make it to New Orleans for the big game?

Capitalizing on Super Bowl XV, The Prince Company offered consumers tickets to the super bowl. The one they have in mind however, is a bowl of Prince Superoni—the super high-protein pasta successfully introduced last year.

Full page advertisements created by Venet Advertising offered tickets in the form of XV¢ coupons toward the purchase of a box of Superoni. "Only one pasta could make it to the super bowl," the copy reads, "Superoni—America's Super Bowl."

The ads appeared in Wednesday, January 21, 1981 issues of The New York Times and the Boston Globe.

"The NFL Super Bowl has become the number one sporting event in this country," states Zal Venet, president of Venet Advertising. "And, we couldn't pass a super opportunity to attract what we believe will be unprecedented attention for a print ad."

New President at R-F

Ernest J. Ravarino has announced the appointment of B. J. Ben Muhlenkamp as President of Ravarino & Freschi, Inc., effective January 1,

1981. Mr. Ravarino continues his association with the company as a full-time consultant.

Before joining R-F last fall, Mr. Muhlenkamp served as financial vice president of the parent company, RHM Holdings (USA), Inc. and as controller of Indian Summer, Inc., a subsidiary of RHM Holdings (USA), Inc.

A graduate of the University of Dayton, Muhlenkamp is a Certified Public Accountant. He is a member of the Ohio Society of Certified Public Accountants, the Indiana Society of Certified Public Accountants, and the National Accountants Association.

Mr. Ravarino stated in the announcement: "My love for and interest in Ravarino & Freschi, Inc. is so deep to demand less than my full participation. I have enjoyed the friendships and associations that I have developed in this industry during the past years and look forward to continuing these fine experiences in the years to come."

Zimmerman Appointed

Richard A. Zimmerman, president and chief operating officer of Hershey Foods Corporation, has been elected to the Board of Directors of the Hershey Trust Company, Board Chair-

man Harold S. Mohler announced. In addition, Zimmerman was appointed to the board of managers of the Milton Hershey School, according to Dr. John O. Hershey, chairman of the board.

The Hershey Trust Company serves as trustee for the Milton Hershey School.

At Hershey Foods Corporation, Zimmerman directs Hershey's five operating divisions, including Hershey Chocolate Company, Friendly Ice Cream Corporation, San Giorgio-Skinner, Inc. (manufacturer of pasta products), Cory Food Services, Inc. (office coffee service), and Hershey Chocolate of Canada. Also reporting to him are the corporation's international operations, science and technology, and human resources.

Crop Quality Council Chairman

William W. Hay, Vice President and General Manager, Flour Milling Operations, The Pillsbury Company, was elected Chairman of the Crop Quality Council board of directors at its 59th annual meeting in Minneapolis.

Hay succeeds Earl N. Sonnesyn, Vice President and General Manager, Grain Operations Division, International Multifoods Corporation, who will continue as a director.

E. Robert Kern, Vice President Operations, Milling Division, Peavey Company, was elected Vice Chairman of the Council and John M. Selove, Vice President, Northwestern National Bank of Minneapolis, was named Treasurer. Vance V. Goodfellow was reelected Council President.

Other Council directors include: H. J. Hale, President, ADM Milling Co. Shawnee Mission, KS; Lowell Hagens, Asst. General Manager, G.T. A., St. Paul, MN; Richard F. Hollins, Vice President, DeKalb Ag Research, Inc., Axtell, TX; Thomas J. Lee, Vice President, General Mills, Inc. Minneapolis, MN; Melvin H. Midlents, Div. Vice President, Commodity Marketing, Cargill, Inc., Minneapolis, MN; Lloyd E. Skinner, Chairman, San-Giorgio-Skinner, Inc., Omaha, NE; H. B. Stoker, Jr., President, Atwood Larson Co., Minneapolis, MN; Linus L. Tumbleson, Dir. Agricultural Development, Burlington Northern, Inc., St. Paul, MN.



William W. Hay



E. Robert Kern

The Crop Quality Council is involved in educational and research activities involving cereal grain production.

Richards Joins Aseeco

Appointment of William J. Richards to the newly-created position of Vice President, Administration and Marketing for ASEECO Corporation was announced by Vaughn Gregor, president.

In this new position, Richards will be responsible for market planning and sales promotion functions as well as administrative duties.

Prior to joining ASEECO, Richards served as Vice President, Planning and Administration, for a major transportation company. He has also served in a number of management, marketing and engineering positions at major corporations.

Richards, who earned his engineering degree from the University of



William J. Richards

Minnesota in 1962 and his Master of Business Administration from UCLA in 1968, resides in Pacific Palisades with his wife Dorothy and two daughters.

ASEECO Corporation maintains corporate headquarters at 8857 West Olympic Boulevard, Beverly Hills, California. They design and produce customized bulk material moving systems including vibrating, belt, and bucket conveyors.

Campbell VP for Procurement

Campbell Soup Company has announced the appointment of Hal C. Ransom as Vice President-Procurement.

Mr. Ransom joined Campbell in 1943 as Assistant Purchasing Agent at the Chicago Canned Food Plant. He served in a variety of sales, production and purchasing functions at the Company's headquarters here and in the Canned Food and International Divisions. He was named Senior Purchasing Agent at the Camden Plant in 1958 and Director-Procurement Department for the Company in February, 1980.

A native of Nashua, Iowa, he attended Iowa State University, majoring in agricultural economics.

ADM Mill at Hudson

The Red Wing, Minn., flour mill of ADM Milling Co. will be closed in mid-February, it was announced by H. D. (Doc) Hale, president. The closing of the 5,000-cwt plant in Red Wing will coincide with the start-up

(Continued on page 32)

**What is this nonsense
about pasta being heavy?**



Pasta is a light weight

**Most consumers don't realize the
low caloric content of pasta products.**

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ADM Milling supplying Breadwinners since 1902

ADM

ADM also supplies quality bakers shortening, corn sweeteners,
CO₂, soy protein and vital wheat gluten for the baking
industry.

ADM Mill at Hudson

(Continued from page 29)

of operations at the company's new mill in Hudson, N.Y., Mr. Hale said. The Hudson plant also has capacity of 5,000 cwt. The durum unit of 3,000 cwt at Hudson is expected to start operations about a month after the bread wheat mill.

The mill elevator at Red Wing will be utilized by ADM for sunflowerseed, flaxseed and other grains, Mr. Hale said.

Howard H. Moore, manager of the Red Wing Division of ADM Milling, will continue as manager of the Atkinson and Nokomis (durum) divisions in Minneapolis.

Multifoods to Enlarge St. Paul Durum Mill

International Multifoods Corp. has signed contracts with Buhler-Miag, Inc., Minneapolis, for the modernization and enlargement of one of the company's semolina mills in St. Paul. The mill, currently listed at 5,600 cwt, will be expanded to 8,000 cwt, which will make it the largest single durum unit in the world. Several other complexes in the U.S. have larger capacity but comprise two or more units. Plans are to accomplish the project within 18 to 24 months without interrupting production.

Pillsbury Consumer Unit Strong

Sales and net income of The Pillsbury Co. in the second quarter ended Nov. 30 reached record highs with "an unusually strong performance" noted for Consumer Foods operations.

Net income of Pillsbury in the second quarter totaled \$38.8 million, equal to \$1.93 per share on the common stock, up 12% from \$34.8 million, or \$1.73 per share, a year ago. Sales aggregated \$893.6 million, up 11% from \$803.3 million in the second quarter last year.

In the six months ended Nov. 30, Pillsbury had net income of \$67.5 million, equal to \$3.36 per share, up 13% from \$59.5 million, equal to \$2.97 per share, a year ago. The current first half net includes a \$2.1 million first quarter gain from sale of technology for overseas development; the year ago net includes \$1.4 million first

quarter gain from sale of holdings in an Australian affiliate.

Net earnings for both the second quarter and first six months of fiscal 1981, Pillsbury said, reflect lower estimated effective tax rates than a year ago, due primarily to increased investment tax credits and reduced state income taxes. In the first half, taxes on income totaled \$48.9 million, off 11% from \$54.9 million a year ago.

Flour Gains

In the second quarter, Pillsbury said, Consumer Foods had sizable increases in deliveries of frozen pizza, family flour, cake mixes, frosting, bread mixes, potatoes and sweeteners. Margins in canned and frozen vegetables firmed in the second quarter due to a reduction in industry supply and are expected to continue to improve in the third quarter, Pillsbury said.

While Agri-Products had "a fine quarter," Pillsbury said results trailed the record performance of a year ago. International operations were again strong, it said, with European and Latin America/Pacific companies showing solid operating gains.

Restaurant results were modestly ahead of the previous year and reflected the impact of "a soft economy," Pillsbury said.

Overall, Pillsbury said, the company's record quarter came notwithstanding an increase of \$5 million in interest expense, due primarily to increased use in Agri-Products as well as higher rates.

"We are pleased that our balanced portfolio produced record-setting and above-plan earnings in the first six months in spite of a difficult and unpredictable economic environment," William H. Spoor, chairman said. "Earlier we stated we expected earnings per share for the fiscal year to exceed \$5.90. With two excellent quarters behind us, we now feel the \$5.90 figure is conservative."

General Mills Peak

General Mills, Inc., posted record sales and earnings in the second quarter and first half ended Nov. 23. E. Robert Kinney, chairman, attributed "exceptional" second quarter results to strong demand for the company's basic consumer food lines, continued

strength from expanding restaurant operations, seasonal upturns in the apparel and fashion businesses and benefits of heavy first-quarter marketing expenditures supporting new product introductions and expansion efforts.

Net income of General Mills in the second quarter totaled \$84.2 million, equal to \$1.67 per share on the common stock, up 37% from \$61.7 million, equal to \$1.22 per share, a year ago. Sales aggregated \$1,394,900,000, up 16% from \$1,204,800,000.

In the 26 weeks ended Nov. 23, General Mills had net income of \$128.4 million, equal to \$2.55 per share on the common stock, up 23% from \$104.5 million, or \$2.07 per share, in the first half a year ago. Sales totaled \$2,483,900,000, up 14% from \$2,177,800,000.

H. Brewster Atwater Jr., president and chief operating officer, said each of the company's five major business areas contributed to first-half sales growth. Each, except Specialty Retailing, also made important contributions to the earnings gain, he said.

Consumer Foods exceeded its objectives in the second quarter and achieved unit volume growth of nearly 4%, Mr. Atwater said. This included volume gains of more than 6% by ready-to-eat cereals and layer cake mixes, 5% by family flour and 13% by Bisquick baking mix. Supported by new products and market expansion, the Nature Valley line of granola products grew by 31% and Yoplait yogurt by 55%, Mr. Atwater said.

During the second quarter, General Mills retired three 4¼% promissory notes, with face value of \$10 million each, due May 1 of 1982, 1983 and 1984. This resulted in a \$3.3 million after tax gain.

The second quarter results, Mr. Kinney and Mr. Atwater said, should ensure attainment of record sales and earnings in fiscal 1981.

They cautioned that General Mills expects the economic environment to be negative during the remainder of the fiscal year and that further operating gains before last in, first out adjustments would not be large. Mr. Kinney and Mr. Atwater said it was too early to estimate LIFO charges for the remainder of the year due to volatile commodity markets but cautioned that the company expects a

large LIFO charge in the second half. In the second half a year ago, they added, a LIFO gain equal to 1¢ per share was recorded.

Highlights

I. General Trends

American consumers today are struggling hard to maintain their interest in and previous level of commitment to good nutrition — but there are definite signs that the impact of a rapidly rising rate of inflation is already forcing them to change many of their food shopping, preparation, meal serving and food consumption habits. For many Americans, the cutting edge today in making their food decisions is not improved nutrition, but rather the overstretched family budget. Inflation is now affecting more than half the consumers (53%) with either a high (23%) or a moderate (30%) impact in their day-to-day lives, how they eat, take care of their health and try to cope with new pressures and tensions.

Almost all consumers (86%) expect high prices and inflation to have either a lot (57%) or some (29%) impact on their own household's food purchasing preparation and consumption habits in the next year or two.

II. Positive Signs

Interest in Nutrition: While interest in nutrition has dipped slightly over the past two years, a high 72% of the men and women interviewed continue to believe Americans are more interested in nutrition than they were just a few years ago.

Health and Food Outlook: When asked to assess their eating, drinking, shopping and health habits compared to a few years ago, consumers indicated that they were more likely now to:

- 1) Watch their weight (+39% net difference)
- 2) Watch their calories (+30%)
- 3) Read popular books about nutrition and diet (+11%)
- 4) Substitute wine for hard liquor (+9%)

NUTRITION VERSUS INFLATION: BATTLE OF THE '80's The "Second Woman's Day/FMI Family Food Study" conducted by Yankelovich, Skelly and White, Inc., and co-sponsored by Woman's Day Magazine and The Food Marketing Institute

and less likely to:

- 5) Drink alcoholic beverages (-19%)

Physical Fitness: The public's interest in physical fitness, once regarded as a possible fad, continues strong, with 72% of the people reporting that they are doing either the same or more exercise than they did last year.

New Values: Almost one out of two men and women (48%) continues to subscribe to a more unconventional approach to diet. The percentage is exactly the same as in 1978. The "Unconventionals" believe that it is not important that each meal be balanced, but rather subscribe to the concept of the balanced day. According to the Unconventionals, you can eat any kind of food at any meal.

Food Ingredients: Concern about pesticides, additives, cholesterol and sodium and the importance of fiber has neither increased nor declined. Consumers in this study were grouped into high, moderate and low levels of concern about food and food additives; each group comprised about a third of the marketplace.

Behavioral Changes: About one out of three consumers (36%) agrees with some of the experts that people will probably eat better during a period of economic difficulty, since they will have to cut down on snacks and convenience foods. There are indications that this is indeed happening. A majority of consumers (78%) are making major (30%) or minor (48%) efforts to improve their diet.

III. Negative Signs

Signs of Slippage: Running through the results of the study are some early warning signs that the public's interest in and pursuit of good nutrition may be declining:

While 72% of consumers continue to believe that Americans are more concerned about nutrition than they were five years ago, this preoccupation with nutrition appears to have eroded somewhat during the past two years. Asked a similar question in 1978, 81% of consumers responded that they thought concern with nutrition was on the rise.

Men and women agree that they are eating more nutritiously than they did two years ago, but the rate of improvement is decidedly down from two years ago. In 1980, 38% of consumers reported that their families' eating habits had improved; whereas in 1978, 54% reported that their families were eating more nutritiously.

Sticking to the budget and the high cost of food are more than likely to be mentioned as barriers to good nutrition in 1980 than they were in 1978 — especially among those most affected by inflation.

Fewer people than in the past are paying a lot of attention to nutritional labeling (21% now; 28% in 1978) and similarly, the number of people who are paying no attention to labels at all has increased (34% now; 28% in 1978).

Currently 28% of men and women say that they are definitely not well informed about nutrition, compared to 13% who felt this way two years ago.

Limited Definition of Good Nutrition:

The definition of a "well-balanced diet" for the vast majority (80%) of consumers consists of having enough meat, vegetables, dairy products and fruit (61%), or just eating normally (19%). Only a small minority (20%) believe that it includes checking the daily intake of all the necessary proteins, vitamins and minerals.

(Continued on page 36)

production

25 tons per day

length

55 feet

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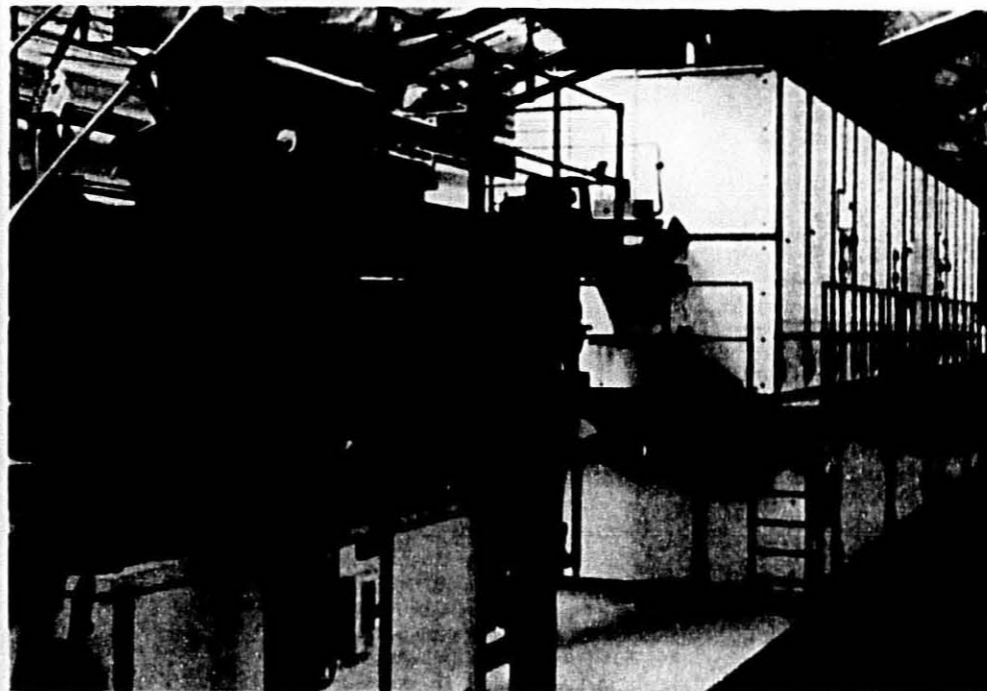
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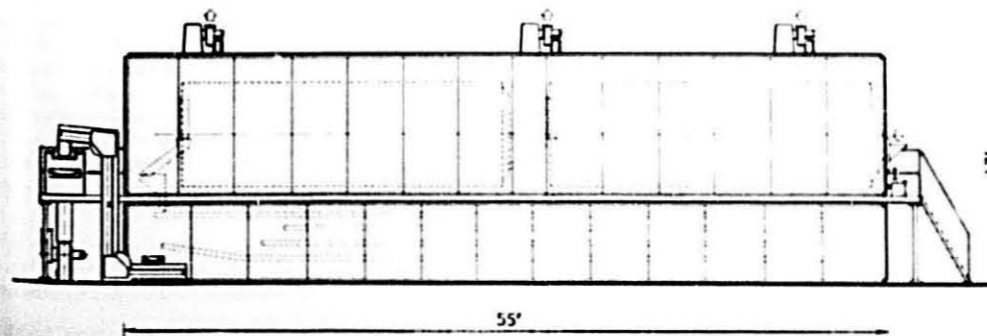
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- 2 Metal rotary dryers model Romet 24/8
- 1 Finish dryer type Teless ATR/17/4
- 1 Cooling shaker



Nutrition vs. Inflation

(Continued from page 33)

- One out of two consumers (50%) states bluntly that they usually choose foods that they like rather than foods that are good for them. Also, a substantial majority (73%) strongly agree (26%) or partially agree (47%) that most people — including themselves — talk a lot about nutrition but seldom do what is good for them.
- While budget concerns are encouraging people to cut back on sweets, snacks and soft drinks, they are also having a negative impact — especially among those most affected by inflation. Unlike other consumers, those most hurt by inflation are increasing their consumption of starch products, such as macaroni, spaghetti, noodles and bread.

Inflation Versus Time and Energy Pressures: Looking ahead, consumers see inflation as the dominant influence on future food shopping, preparation, serving and eating habits (72%), far outweighing the influence or impact of energy shortages (12%) or time pressures (6%).

IV. Nutrition Issues

1. Labeling

- One out of two consumers compares the nutritional value of different brands.
- Consumers continue to want more nutritional labeling, even if it adds to the cost (66%).
- The most important nutritional and content information wanted on the label right now includes sugar content (41%), vitamins (35%), protein (35%), and calorie content (37%).

2. Natural Foods

- Interest in natural foods has neither increased nor decreased during the past two years.
- Two out of three consumers continue to agree that natural foods are healthier than modern processed or prepared foods.

3. Dieting and Weight Control

- The percentage of dieters, adults who have started or been on a diet in the previous two weeks, is approximately the same as it was two years ago.

4. Fast Foods

- As in 1978, two out of three respondents have been to a fast

food restaurant in the previous month, but the percentage of Fast Food Fans (i.e., adults who have been to a fast food restaurant four or more times in the past month) has moved from 17% in 1978 to 26% in 1980.

- As in the past, nutritional concerns go out the window when it comes to eating out in a fast food restaurant.
- A strong majority (58%) say point-blank that the food served in fast food restaurants is not as good as the food served in their own homes.

5. Vitamins

More than half of all consumers (57%) do not believe that it is necessary to take vitamins if you have a good diet.

V. Family, Children and Parenting Issues

Changing Family Roles: Fewer people than in the past believe that:

- It is up to the mother to see to it that her family is well fed (60% now; 71% in 1978).
- The man should be the main provider (41% now, 48% in 1978).

Working Women: Men (55%) and nonworking women (55%) agree that the families of working women do not eat as nutritiously as families of women who do not work. Working women, on the other hand, disagree (52%), but not by a large margin — indicating that there is some uneasiness on the issue even among themselves.

Advertising to Children: One out of two men and women continue to mention that children asking for things they see advertised on television is a significant barrier to good nutrition in their households.

Vending Machines in Schools: The public, including parents, is split down the middle on the use of vending machines to sell snacks in schools. Half feel that they should be banned, half feel that the children should not be deprived of the opportunity to have a treat from time to time.

Key Groups

- Lower-income families — both white and non-white
- One-income households
- Parents, especially those with larger families

Macaroni School
Radisson South, Minneapolis
April 27-30, 1981

Retailer vs. Food Processor

A government-funded study of food industry trends during the next decade predicts a struggle between supermarkets and food processors as both segments try to broaden their sales through vertical integration.

"The industry is ripe for vertical integration," according to the study, prepared for the Federal Trade Commission. It adds that such integration could occur as processors move backward toward (agricultural) production and forward toward some type of wholesale or cooperative retailing; retailers move backward toward processing, and distributors (wholesalers) move forward and backward through (becoming) small regional processors and retailers."

The winner of this struggle probably will be retailers the report notes, as they move toward "a management system which seeks more than just volume, but (also) optimization of returns per square foot or per foot of shelf space."

See Processors Down by Half

The report states, "most forecasters... indicate that half the present number of food processors will disappear within this decade. We detect patterns, however, which will weaken the relative strength of the national-brand processor, provide retailers with good leverage for backward integration and... encourage integration forward from the (agricultural) producer."

As retailers keep looking for ways to increase their profits, they will turn more and more toward private-label products, which will mean national-brand manufacturers will increasingly have to contract their productive capacity for these private labels, the report concluded.

"Typical supermarkets will be searching for higher-margin items than foods. This trend into (more non-food) will exert pressure on chains to identify their store names with specific brands of higher quality and limit shelf space for foods. Another technique will be expanded private labeling, allowing the store to retain control over specifications and quality control."

This shift toward more private-label goods will develop because "a growing trend will be high retail concern

tration," the report said. This will increase the value of a product's "store image," lessening a retailer's willingness to depend on nationally advertised brands "unless his own name can become associated with the product and more beneficial margins allowed."

"Such concepts as leased shelf space are not unthinkable," the study added, "particularly if the manufacturer wants to keep any control over the space allocated to his product mix."

"Leased shelf space could raise some intriguing questions," Robert W. Williams, the study's director, added. "For instance, if chains sell the space to the highest bidder, it is possible that only one type of product or product choices within the same price band would be displayed. Also, how could it be guaranteed that the prices for shelf space will be established completely particularly in markets dominated by one or two retail chains?"

This possibility further encourages the present trend toward private labeling, the report said. "Not only will that tactic clearly project the 'value' of the retailer's name, but it will allow the retailer to have a means to integrate backward toward the increasingly competitive raw materials market."

Two Views

This private label trend will be viewed as both an opportunity and a threat by national brand processors, the study said. It would be "an opportunity because they will be seeking ways to move forward and backward themselves; a threat because of the increased advantages it will give integrated regional processors/retail distributors."

"A major battle will develop (as groups) of national, centralized processors seek to limit retailers by moving forward themselves to develop a new type of name brand processor-retailer. Such a concept could take the form, for example, of some sort of 'co-operative' name-brand store. Likewise, national processors will attempt to block retail moves backward by making it hard for private-label processing centers to acquire raw materials."

The study pointed out that cutting off raw materials could be accomplished by direct ownership of agricultural commodities by processors, or by long-term procurement contracts. In

the light of the antitrust scrutiny the food industry receives, the report anticipates "attempts to institute the latter circumstances rather than the former."

The report also pointed out that, to the degree that chains continue to expand, "one-step warehousing will grow at the expense of the local retailer or the local independent wholesaler. Innovative independent wholesalers probably will seek to become contract service distribution and delivery centers for chains in their areas."

"Another growing development will be the concept of open retailing," the report added. "Retail outlets by this technique give (consumers) discounts for advanced for or standing orders, which can be billed and delivered in bulk as soon as goods arrive at the store. That practice allows the store to limit the amount of 'in-store' handling and permits greater volume to flow through an establishment without taking up shelf space or back-up storage."

The report was prepared for FTC's Office of Policy Planning, to aid the commission in future regulation of the food industry. One objective of the study was to help FTC officials anticipate food industry problems and begin right away to prepare the policy plans to deal with them.

Robert Williams, the study's director, started an economics and management consulting firm in 1973. Before that, he served as deputy director of the Stanford Research Institute's Center for the Study of Social Policy. He also served a year as research director for the President's Advisory Council on Management Improvement during the Nixon Administration.

An official of Charles W. Williams, Inc., the firm Williams owns, added that Williams had worked for several food processing firms, apparently as a consultant on future trends in the industry.

Opportunity for Foodservice Brokers

The combination of slightly declining sales and inflation presents an opportunity to foodservice brokers. They must also understand exactly what their market is, however.

This assertion was made by David S. Wexler, Publisher of Institutions

Magazine, during his presentation at the National Food Brokers Association Foodservice Workshop.

"Things aren't as good as when I last talked with you," Mr. Wexler told workshop participants. "That doesn't mean they're bad... they're about 1.5 percent off in real dollars."

"I had said the foodservice business would grow and that is still largely true. You can still stimulate sales, but the market is not growing so fast now."

Mr. Wexler told the Workshop participants that they must be aware of exactly what their market is and what figures to use for reference.

"\$120 billion market is a misleading number. For you the food brokers it is not a \$120 billion market. You have to stop talking about sales at retail."

"All brokers need to talk about is the food going in. It may be that it is only \$40 billion going in, and then brokers must take away some for red meat and bakery, so all you can talk about is what you sell at wholesale," Mr. Wexler told the foodservice participants.

He also reminded them that inflation distorts sales figures. "Inflation is like a drug. We were brought up to see an ever ascending line on the chart. As long as that line rises, we feel good. But it doesn't mean a thing. With inflation running at 10 percent, you have to show a 10 percent sales increase just to stay even."

Mr. Wexler stressed however, that the figures are regional and food brokers have a tremendous advantage in being local representatives. "You cannot judge your situation by what is happening nationally. It is different in each part of the country. This is a local business and that is your greatest opportunity," Mr. Wexler told the workshop.

He then reviewed the results of a survey conducted by Institutions and NFBA on the perception of the foodservice sales person by the customer and discussed its interpretation.

Mr. Wexler also moderated a panel of three foodservice executives. Members of the panel were, Phil Lempert, The Lempert Company, Bellville, NJ; Sam Speros, Calkins and Company, Chicago; and Gordon Williams, Delbert Craig Company, Wilkes Barre, PA.

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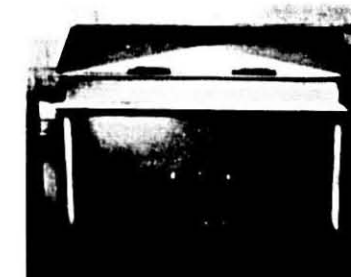
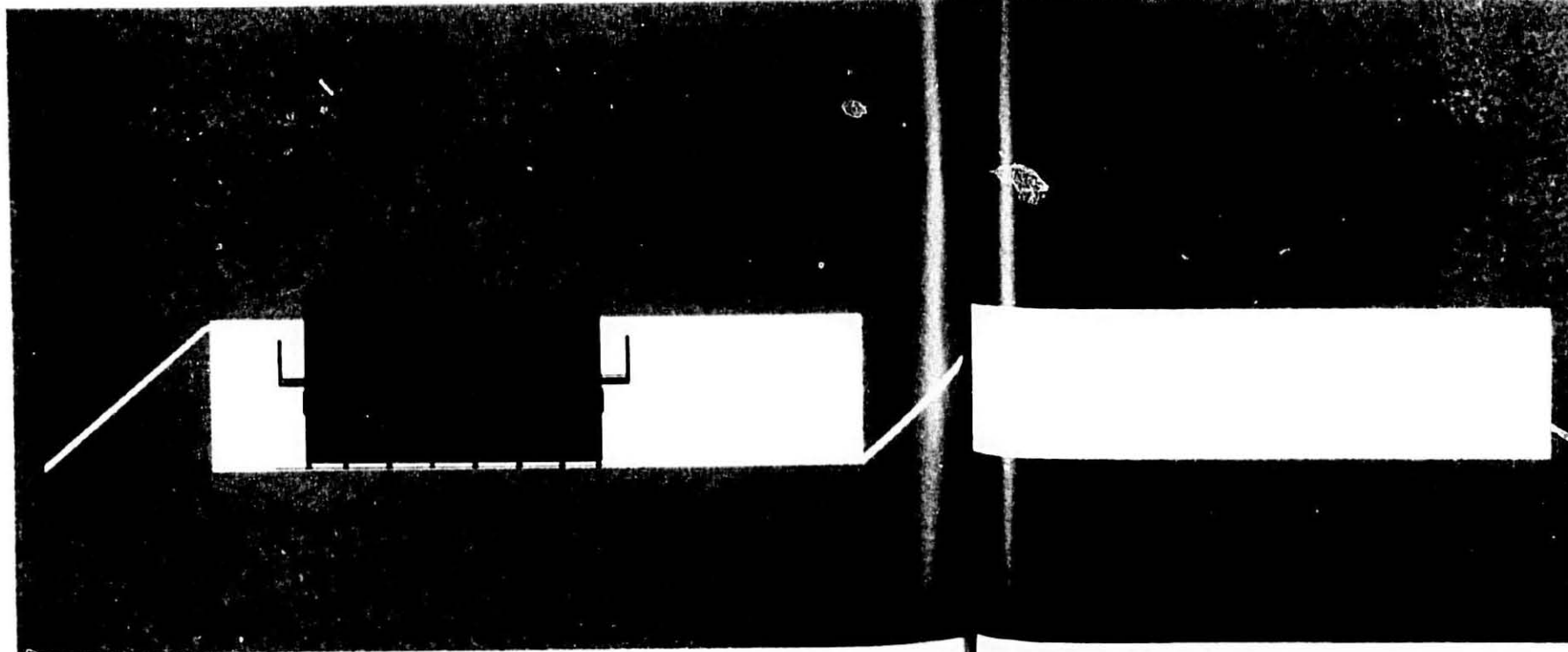
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Technical director of a large pasta plant.
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Pasta drying operation from production line comparisons by two processors. Shows total energy saved.



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Redison South, Minneapolis
April 27-30, 1981

Interpack '81, Dusseldorf
West Germany, May 14-20

77th Annual Meeting N.M.M.A.
La Costa, Carlsbad, CA
July 12-16, 1981

Milton R. Young Honored

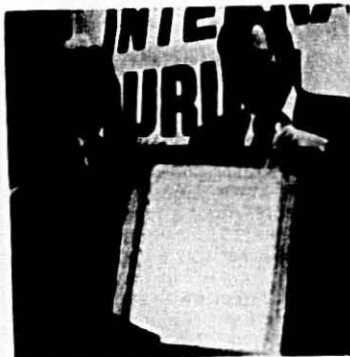
Milton R. Young, Senator from North Dakota from 1952 to 1980, was honored with a plaque at the International Durum Forum in Minot, by the National Macaroni Manufacturers Association.

It was received in absentia by Mayor Chet Reiten as Senator Young had to return to Washington for the final session on appropriations. The plaque read as follows:

RESOLUTION

WHEREAS: The National Macaroni Manufacturers Association is the official voice of the pasta industry in the United States and

WHEREAS: The members of the Association recognize the essential contribution of Senator Milton R.



NMMA President Les Thurston (left), and Mayor Chet Reiten of Minot, North Dakota.

Young as a distinguished leader of government and

WHEREAS: Senator Young has provided wise counsel and direction as a member of the Senate Agriculture Committee and

WHEREAS: The pasta industry recognizes the importance of the great State of North Dakota as a primary source of raw materials for products of our industry.

Now, therefore, be it resolved that the Board of Directors of the National Macaroni Manufacturers Association extend to Senator Young our sincere congratulations and appreciation for his service to the State of North Dakota and the United States of America.

That Senator Young receive the citation of this Association for his contribution to the well being of the pasta industry and



Milton R. Young

That the Distinguished Achievement Award be presented to Senator Young with the heartfelt best wishes and sincere appreciation of this Association.

By action of the Board of Directors.

Final Durum Estimate

The Department of Agriculture's crop summary for durum wheat presents the following estimates on wheat production by states, with comparisons for 1979 and 1978, yield per harvested acre and acreage harvested:

	Production		Yield per acre		Area harvested
	1980	1979	1980	1979	
	(1,000 bu)	(1,000 bu)	(bu)	(bu)	(1,000 ac)
Ark	12,400	5,250	6,370	60.0	115
Calif	7,300	3,600	8,625	78.0	100
Mont	3,300	2,842	3,775	38.0	120
Nebr	7,800	6,825	8,700	19.0	400
N Dak	71,150	84,500	102,000	19.0	3,850
S Dak	4,885	3,630	3,800	19.0	215
U S	108,395	108,654	135,328	22.4	4,860

Seaboard Allied Milling Corp.

Net income of Seaboard Allied Milling Corp. in the 24 weeks ended Nov. 30 increased 17% over first-half earnings a year ago.

Net income of Seaboard in the first half of fiscal 1980 totaled \$3,989,355, equal to \$2.68 per share on the common stock, up from \$3,421,212, or \$2.30 per share, a year ago. Sales aggregated \$193,053,108, up 4% from \$185,289,389.

Domestic earnings are still being held back by inflationary costs and record interest rates, but, of late, flour prices are more accurately reflecting these rapidly escalating expenses, Seaboard said. "The Albany expansion is proceeding as scheduled and should be operational in another 60 days."

The overseas picture "as a whole is encouraging," Seaboard said, despite "reduced activity in Sierra Leone and account foreign exchange difficulties." Seaboard noted that doubling of the capacity of its Nigeria flour mill is under way and a major increase in capacity of Top Feeds, the mixed feed facility, is in progress.

Earnings before taxes of Seaboard in the first half totaled \$6,214,355, up from \$6,068,212 a year ago. Income taxes aggregated \$2,225,000, off slightly from \$2,667,000.

Pastaville II:
Fifth International Durum Forum
Minot, North Dakota
November 11-14, 1981

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