

THE MACARONI JOURNAL

**Volume 65
No. 6**

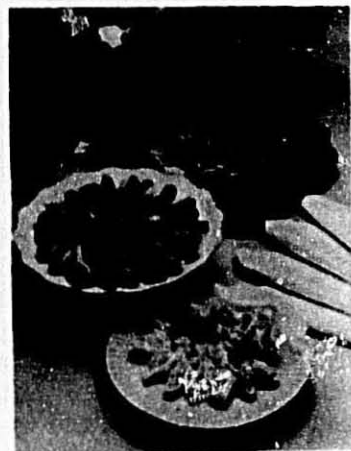
October, 1983

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Macaroni Journal

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OCTOBER, 1983

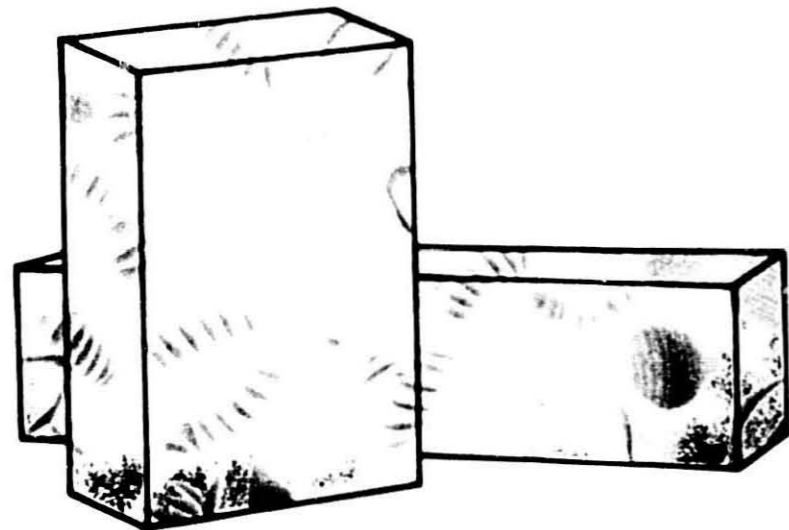


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Publicity Covers National Pasta Week in Every Media

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The **Macaroni Journal**

V. 5
No. 1
1983

Published by the National Macaroni Manufacturers Association

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In This Issue:

S. P. A., P. P. W., W. E. C., B. P. C., G. S. S., R. S. S., S. P. S., J. E. S., J. E. S., S. P. A., M. P. S., J. D. M., J. E. S., J. A. S., N. E. S.

Pasta Goes American

The National Macaroni Manufacturers Association has announced that it will be producing a new line of American-made macaroni. This new line of macaroni is being produced in the United States and is being marketed under the name of "American Macaroni". The new line of macaroni is being produced in the United States and is being marketed under the name of "American Macaroni".

PASTA WEEK—a national publicity effort for pasta products

Publicity Covers National Pasta Week in Every Media

National Pasta Week, October 6-15, will use the theme "Pasta Goes American" in the creation of materials for consumer media.

The ever-increasing recognition of a "new" American cuisine provides an excellent opportunity for pasta to be integrated into this current concept. The focus is on American regional cookery with emphasis on the use of our native foods such as poultry, game, fish, corn, pumpkin, blueberries, strawberries, etc., reflecting our food heritage. Pasta is a natural to add variation to fish chowders, chilis, gumbos, salads, stews, etc.

All consumer news bureau materials will promote the "Pasta Goes American" theme, emphasizing the use of American pasta in traditional, American-style recipes. This gives us an opportunity to capitalize on the popularity of American cuisine as we emphasize pasta's versatility in nutritional and regional recipes.

Consumer News Bureau Releases

Newspapers

Major Market

Two transparencies will be serviced to color-using papers. Featured recipes — Svelte Spaghetti and Meat Sauce, Noodles and Beef-Vegetable Stroganoff. Black-and-white versions will be distributed to non-color using publications in 265 major market areas.

Syndicated Sunday Supplements

Family Weekly.

Syndicates

Photo placements:

Associated Press, Newspaper Enterprise Association, King Features, Amalgamated Publishers, Economist Newspapers, Life Newspapers, Enterprise Journal, Paddock Publications, Suburban Newspapers, Inc., Westchester Rockland Newspapers, Afro-American Newspapers.

Non-photo placements:

King Features, United Features.

Magazines

Parents, Lady's Circle, Woman's World, True Story.

Electronic Program

Television:

Five-Part Newscast Series

Distribution to 100 stations in top 200 markets.

Television PSA's

2 to 100 stations in top 200 markets.

A television kit containing an on-air prop including packages of elbow macaroni, egg noodles, and spaghetti, four color slides, the recipe leaflet "Pasta Goes American", and script have expected usage of 75-100 women's interest stations.

Cable/ITV

Magazine-format to be sent to 300 cable TV stations.

Radio:

Women's Interest Programs

Segments to be sent to 1,000 stations in small and medium markets.

Radio PSA's

Two sent to 1400 stations via satellite.

Supermarket Consumer Specialists will be provided with "Pasta Goes American" leaflet to be distributed through consumer information centers in chains and independents.

Materials Available

Posters: Background — Milling & Pasta Manufacturing diagram — 50¢ plus postage and handling. "19 Varieties of Pasta" — 35¢.

Background Material: "Pasta Portfolio" — 28-page booklet containing: Manufacture of Macaroni Products; High Quality Hard Wheat for Macaroni Products; Semolina and/or Hard Wheat Flour for Macaroni; The Many Shapes of Macaroni Guide to Buying and Use of Macaroni Products; Basic Directions for Cooking Macaroni Products; Food Value of Macaroni Products; How to Use Leftover Macaroni; Etiquette of Spaghetti Eating; Macaroni Legends. This booklet sells for 50¢ each shipped f.o.b. Palatine, IL.

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

"Nutritive Values of Macaroni Spaghetti, and Egg Noodle Products".

"Pasta Primer"—basic background piece.

"Eat Light with Pasta".

"Pasta in a Slim Cuisine".

"Macaroni Is No. 1".

"One-Pot Pasta Suppers from the Freezer".

"For Weight Control — Use Your Noodle".

"Entertaining with Pasta".

"Unimac Cookery" — pasta quickies for singles and doubles.

"Pasta . . . Food for Athletes".

Foodservice Manual — \$10 per copy.

- (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.

Typical Releases

Svelte Spaghetti and Meat Sauce (Makes 4 servings)

- 1/2 pound ground beef chuck
- 1/4 cup chopped onion
- 1 small clove garlic, minced
- 2 cups canned whole tomato with thick puree
- 1 teaspoon oregano leaves, crushed
- Dash each salt and pepper
- 8 ounces spaghetti
- 1 tablespoon salt
- 3 quarts boiling water



Svelte Spaghetti and Meat Sauce

THE MACARONI JOURNAL



Macaroni and Vegetable Ring

In a large skillet over low heat, cook meat, onion and garlic, stirring to break up meat, about 5 minutes or until meat is very light browned and onion is tender. Drain off excess drippings. Add tomatoes, oregano, dash of salt and pepper. Cover and simmer 15 minutes.

Meanwhile, gradually add spaghetti and 1 tablespoon salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Serve spaghetti with sauce.

Calories per serving: 445.

Noodles and Beef-Vegetable Stroganoff (Makes 4 servings)

- 8 ounces medium egg noodles (about 4 cups)
- 1 tablespoon salt
- 3 quarts boiling water
- 1/2 cup canned beef broth, divided
- 1/2 pound boneless beef sirloin steak, cut crosswise, into 1/4-inch thick slices
- 1 cup thinly sliced carrots
- 1/2 cup sliced scallions
- 1/2 cup green pepper strips
- 1/2 teaspoon dill weed
- Dash each salt and pepper
- 1 large tomato, cut into 8 wedges
- 1/2 pound mushrooms, sliced
- 1/2 cup lowfat plain yogurt

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

While noodles are cooking, heat 1/4 cup beef broth in large skillet. Add sliced and cook, stirring frequent-



Macaroni Fruit Buffet Salad

ly, until meat is cooked on all sides, about 5 minutes. Remove meat to plate. Add carrots, scallions, green pepper, dill weed and pepper to skillet along with the remaining 1/4 cup beef broth. Cover and cook about 5 minutes or until carrots are crisp-tender. Add meat, tomato wedges and mushrooms and cook 2 to 3 minutes longer or until mushrooms are tender and tomatoes are slightly juicy. Remove from heat and quickly stir in yogurt. Serve over noodles.

Calories per serving: 398.

Macaroni and Vegetable Ring (Makes 6 to 8 servings)

- 2 tablespoons salt
- 4 to 6 quarts boiling water
- 4 cups elbow macaroni (1 pound)
- 1/2 cup chopped celery
- 1/4 cup grated onion
- 1/2 teaspoon celery salt



Noodles and Beef-Vegetable Stroganoff



Skillet Beef Scramble

- 1/2 teaspoon seasoned salt
- 1/4 teaspoon pepper
- 3 cups cooked mixed vegetables
- 1/2 cup French dressing

Add 2 tablespoons salt to rapidly boiling water. Gradually add macaroni so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Rinse with cold water. Drain.

Combine macaroni, celery, onion, celery salt, seasoned salt and pepper, mix well. Chill. Combine mixed vegetables and French dressing; mix well. Chill. Arrange mixed vegetables in center of serving platter. Arrange macaroni around mixed vegetables.

Macaroni Fruit Buffet Salad (Makes 12 servings)

- 2 tablespoons salt
- 4 to 6 quarts boiling water
- 4 cups elbow macaroni (1 pound)
- 2 cups dairy sour cream
- 2 cups creamed cottage cheese
- 1/4 cup chopped pecans
- 1 teaspoon cinnamon
- 2 cups orange sections
- 2 cans (1-pound, 4 1/2 ounces each) pineapple chunks, drained
- Crisp salad greens
- 2 cans (1 pound, 14 ounces each) apricot halves, drained

Add 2 tablespoons salt to rapidly boiling water. Gradually add macaroni so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Rinse with cold water; drain again.

Mix together macaroni, sour cream, cottage cheese, nuts, 1 teaspoon salt

(Continued on page 8)

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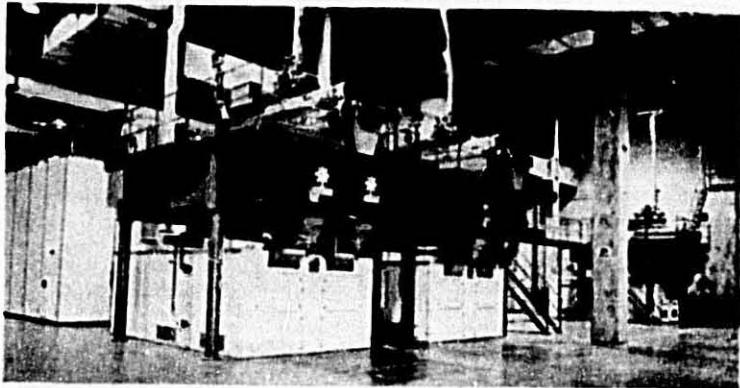
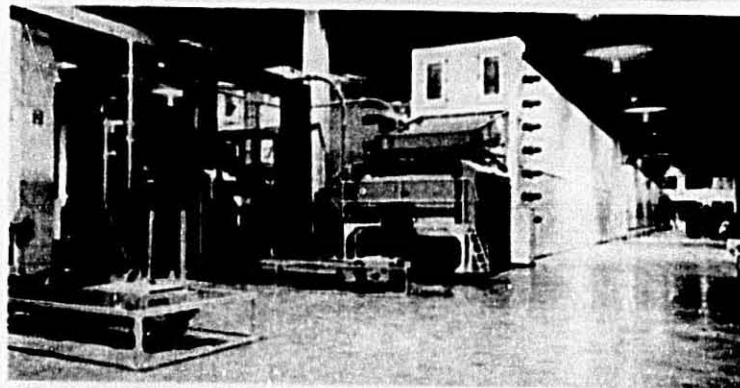
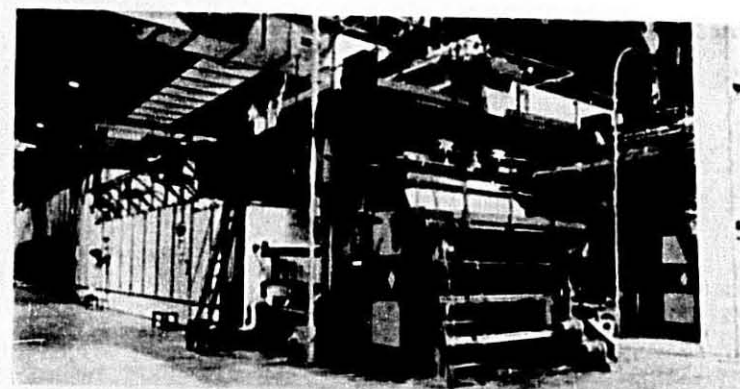
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113 of which 53 are for long pasta,
60 are for short pasta . . .

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and cinnamon. Add orange sections, pineapple and 3 tablespoons of the pineapple syrup. Toss lightly and chill. Mound on salad greens; surround with apricots. Sprinkle with paprika. Garnish with cinnamon, if desired. Serve with additional sour cream, if desired.

Skillet Beef Scramble

Depending on your dictionary, "to scramble" means to mix together confusedly . . . and another tome, equally learned, tells us it's to cook by frying. You can cast your vote for either version and still be accurate with a supper dish aimed to please the family called Skillet Beef Scramble.

Not a bit confusing is the recipe or the easy mixture of every-day foods that makes this dish so great. Skillet Beef Scramble has its beginnings with butter melted in an electric skillet. (A heavy fry pan would work well, too.) It serves as a base for the frying that's to come and at the same time adds flavor to the finished dish. Ground beef, elbow macaroni and Parmesan cheese are mainstays with a host of zippy seasoning cooked right along in the skillet to give the meal distinction.

If there's a bit of scrambling present, it's all to the good, for preparation of this super dish boils down to a single cooking pan—and a mixture that will never stick to it. After frying, water is added to simmer gently until the macaroni is fork tender. Flour, sprinkled on carefully, serves to thicken it.

Additional convenience foods make the meal complete. There is evaporated milk, subtly blending flavors as it adds over-all creaminess. Pimiento contributes a bit of bright color to gladden the eye as it brings extra flavor to the finished dish, too.

For a family supper, the menu might call for just the addition of buttered hot rolls and a vegetable salad. As party fare, Skillet Beef Scramble is superb with garlic bread and an assortment of relishes. However it appears on the table, you won't need a dictionary to translate the adjectives of praise!

The Recipe

1/4 cup butter
1 pound ground beef
1 package (7 oz.) elbow macaroni
1 medium onion, chopped
1 clove garlic, minced

1/2 cup chopped green pepper
1 teaspoon salt
1 1/2 teaspoon seasoned salt
1/4 teaspoon pepper
1 teaspoon oregano
2 cups water
1 tablespoon flour
1 tall can evaporated milk (1 3/4 cup)
2 tablespoons chopped pimiento
1/2 cup grated Parmesan cheese

Melt butter at simmer temperature in electric fry pan. Add ground beef, cooked macaroni, onion, garlic, ground pepper, salt, seasoned salt, pepper, oregano. Increase temperature to 360 degrees and cook, stirring occasionally, until meat is browned and onion transparent. Stir in water bring mixture to a boil. Cover, reduce heat to 212° F. and simmer for 20 minutes or until macaroni is tender.

Sprinkle flour evenly over top of mixture and blend in smoothly. Stir evaporated milk, pimiento and Parmesan cheese. Cook an additional 5 minutes a simmer setting, stirring occasionally. Garnish with pimiento strips as desired. Makes 6 servings.

Cover Photo

Shells with Dill Smoked Oysters

(Makes about

3 1/2 dozen hors d'oeuvres)
1 1/2 cups large macaroni shells (about 3 ounces)*
1 teaspoon salt
1 quart boiling water
2 teaspoons chopped fresh dill
2 teaspoons fresh lemon juice
1 teaspoon prepared mild Dijon mustard
2 cans (3 3/4 ounces each) whole smoked oysters, drained

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

In small bowl, combine dill, lemon juice and mustard. Gently stir in oysters. Place an oyster into each shell. Arrange on a serving plate. Garnish each shell with a tiny sprig of fresh dill, if desired. Garnish with lemon and dill sprigs, if desired. Serve immediately.

* Uncooked shells are about 3/4 inch in diameter.

Shrimp-Chive Shells

(Makes about

3 1/2 dozen hors d'oeuvres)
1/2 pound medium-size raw shrimp
1/2 cup lowfat plain yogurt
1 1/2 teaspoons minced fresh chives
1 1/2 teaspoon salt
1 quart boiling water
Dash cayenne
1 1/2 cups large macaroni shell (about 3 ounces)*

Cook shrimp in boiling water for 1 minute or just until firm. Drain, rinse with cold water. Dry with paper towels; remove shells; devein shrimp and finely chop. Combine shrimp, yogurt, chives, 1/2 teaspoon salt and cayenne. Chill about 1 hour.

Meanwhile, gradually add shells and 1 teaspoon salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally until just tender. Drain in colander. Rinse with cold water; drain again. Pat dry. Spoon about 1 measuring teaspoonful shrimp mixture into each shell. Arrange on a serving plate. Garnish with fresh parsley or watercress, if desired. Serve immediately.

Caviar Pesto-Cheese Shells

(Makes about 3 1/2 dozen hors d'oeuvres)

1/2 cup packed fresh basil leaves
2 tablespoons freshly grated Parmesan cheese
1 tablespoon pine nuts (pignoli)
1 package (8 ounces) cream cheese, softened
1 tablespoon red salmon caviar (about 1/2 ounce)
1 1/2 cups large macaroni shell (about 3 ounces)*
1 teaspoon salt
1 quart boiling water

In food processor or blender, process or blend basil, cheese and nuts until very finely chopped. Scrape contents several times with a rubber spatula. Necessary. Cut up cheese and add to mixture; process until well mixed. Scrape container with spatula several times. Gently fold in caviar. Mixture about 1 hour to firm up. (Do not prepare too far ahead as basil gets dark.) Arrange shells on a serving plate; spoon a few grains of caviar on top of the pesto cheese shell to garnish, if desired. Garnish plate with fresh basil, if desired. Serve immediately.

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PRODUCT PROMOTION REPORT

by Elinor Ehrman, Burston-Marsteller, at the 79th Annual Meeting

Our pasta promotion continues in high gear. At the request of the promotion committee, we have set performance goals for ourselves in the various media categories. You may have noticed that the last monthly report was reformatted so that it stated the goals for the 1982-1983 fiscal year, and gave you a reading as to where we stood as of June 1.

We have structured this visual report to update you on the public relations performance in the media, with some of the highlights, as of July 15.

Our target audience for both media segments remains:

- Women in the 18 to 49 age group
 - Low and middle income families
- Our Message . . .
- Your family can eat pasta every day because it is low in calories
 - Pasta is not fattening

As you know, our consumer program presently is in two parts — Consumer News Bureau, encompassing the print media—the electronic program which embraces both television and radio. As of July 1, nine months into the program, we have achieved these results to meet our goals.

MAGAZINES

GOAL: 75 to 80 pasta placements, to reach a circulation of 20-250 million, in leading consumer magazines. To date: 144 placements, reaching a circulation of 212 million.

Here are a few of them, which have appeared since February 21, the date of our winter meeting.

Parents — in March and May — 2 issues in brilliant color — one stressing economy and versatility; the other pounding home the non-fattening message including calorie count — in a study titled "Shape-Up recipes the family will love." Circulation: 1,789,699.

Weight Watchers — in March and April — both issues with cover stories and recipes photographed in delicious color. Circulation: 826,200

McCall's — May issue — a super story entitled *Fitness Without Fuss* with pasta part of the "New weight



Elinor Ehrman

of life" — pasta with broccoli entree with a mere 168 calories. (Rotelli) Circulation: 6,200,000.

Good Housekeeping — Again in the May issue, "Take a package of elbow macaroni" presents 4 calorie-counted recipes — a dessert, a salad, and 2 entrees. Circulation: 5,520,000

Family Circle—Great ideas series — in a summer issue. "International Classics have old-world flavor but not a lot of calories." Manicotti rolls-up with only 202 calories per serving.

Woman's Day — Summer issue — 101 ways to lose weight and stay healthy. Here's a dramatic presentation of our low calorie story — all with the support of the U.S. dietary guidelines recommending increased complex carbohydrates. The reader is challenged to estimate the calories in each of the three entrees photographed — spaghetti with tomato sauce and cheese, plus a tomato and lettuce salad — a club sandwich — or a diet plate with cottage cheese, hamburger, peach and melba toast. The diet plate calorie count comes to 561, the club sandwich 474. The pasta comes out on top with only 386 calories.

And in the gourmet magazines, once again the low calorie story —

Food and Wine — June issue — "When pasta is not drenched with butter or cream, as it often is, it can provide a satisfying low calorie supper. And it takes so little time to prepare, that dinner will be easy on the cook as well as on the diet.

And again pasta in the black market. **Ebony**—pasta plus—strong nu-

tritional story — stressing carbohydrates. Circulation: 1,300,000

NEWSPAPERS

Jumping over to newspapers, we have confined our clipping services for financial reasons, to only the top 100 circulation newspapers.

Our Goal — For color and black white spreads is 125 to 135, with a total circulation of 25-30 million.

To date — We have 85 spreads for pasta with a circulation of 32 million

Some examples — Coast to coast — 1. **New York Sunday Times** and **Los Angeles Times**.

La Photo Caption - Svelte Pasta offers nearly complete nutrition for just 444 calories. Circulation: 1,000,945.

New York Times — Four recipes — variations of spaghetti with meatballs. Circulation: 1,430,358

Houston Post — Circulation: 348,541 — 2 color photos — with a **Waist Watcher** theme

Denver Post — Broccoli cheese stuffed shells. Circulation: 278,490

St. Louis Globe-Democrat — Heard on pasta. Circulation: 250,726

Cincinnati Enquirer — "Don't trim pasta dishes from weight loss diet." Circulation: 183,951

Detroit News — "Try diet pasta in Brown bag lunch." Circulation: 25,730

Chicago Sun-Times — "I don't have to go starving mad." Circulation: 655,332

Chicago Tribune — Spaghe-ruso photo and recipe. Circulation: 784,388

New Orleans Times-Picayune — "Pasta by itself is low in calories." Circulation: 274,380

Dallas News — And again for portable pasta for an office lunch. Circulation: 284,675

Richmond Times-Dispatch — How to have your pasta and watch calories, too." Cheese stuffed lasagne recipe. Circulation: 132,277

Memphis Commercial Appeal — "Pasta Passions." Mostaccioli salad. Circulation: 198,570

(Continued on page 12)

THE MACARONI JOURNAL



Mama D. D'Agostino, of TV cooking and cookbook fame, serves up pasta packed pasta at Minneapolis' popular Sammy D's restaurant

The proof is in the pasta!

If it looks good and tastes good. That's good pasta! But good pasta requires good products. Like Amber's Venezia No. 1 Semolina, Imperia Durum Granular, or Crestal Fancy Durum Patent flour.

Thanks to uniform high quality, color and granulation, these ingredients make your pasta operations run more smoothly.

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Product Promotion Report

(Continued from page 10)

Notice the headlines — in Seattle, San Antonio, Boston, Pittsburgh and Philadelphia.

In the realm of newspaper syndicates and Sunday supplements we are aiming for 125-130 placements to total circulation of 700 to 750 million. To date, with 3 months to go we've reached 60 for a circulation total of 354 million. Note again the now calorie message in these examples:

United Press International — "Dieticians in general are helping change the image of macaroni products from a fattening food to a nutritious one. Like potatoes, it's not the basic food but the sauces and other add-ons that raise the calorie level." Circulation: 30,000,000

Associated Press — "Along with being nutritious, a pasta meal is lower in calories than most people realize. Five ounces of cooked pasta contain only 210 calories. Circulation: 82,000,000.

Associated Press — Figures given for consumption — 1½ billion pounds of domestically manufactured dried pasta products eaten annually. . . . about doubled since World War II . . . increased interest in nutrition and role of complex carbohydrates. North Dakota cited as "pasta" country . . . growing about 80% of durum wheat used for pasta products.

And just in — Associated Press — A story quoting NPA President Joe Lichtenberg on pasta's values — including the low-calorie message.

In the Black Press:

Amalgamated Publishers — "You, too, can serve chic menus with the food which has become America's number one food craze—pasta! Remember, it's not really fattening — there are only 210 calories in two ounces of uncooked macaroni products . . . 200 in egg noodles. These "light" lasagnas rolls make a chic dish. Enjoy." Circulation: 3,000,000.

In Syndicates:

King Features — "Before you worry about soaring calorie counts, let's clear up a misconception: Pasta by itself is low in calories - 5 ounces tally up to only 210." Circulation: 6,000,000

Chicago Sun Times — "For example, one cup of macarino has about



200 calories when cooked al dente, and about 150 when cooked until tender. Neither is excessive." Photo caption — "Warm, filling and comforting macaroni and cheese needn't be forsaken on a weight-loss diet." Circulation: 900,000—

Star — "Pasta has shed its fattening image and taken its place among the complex carbohydrates — the desirable foods that health experts recommend we eat for 50 percent of our daily calories." Circulation: 3,308,780

Cooperative Efforts:

Add to these results, our cooperative efforts with other food companies and associations. Thus far we have had five such tie-ins including—

"M&M" Mars, The Tea Council plus General Electric National Turkey Federation and Wheat Industry Council.

Food Service:

And winding up our print results are those for foodservice where our goal was 8 placements and circulation of 400,000

To date, we have had with circulations of 556,000. In addition, we have fulfilled 6,050 requests for additional information.

Restaurant Business — March 1. Seafood pesto salad photo and recipe in "Light and Hearty" story. Circulation: 70,369 . . . MPD: 30,150,000

Restaurants & Institutions — April 15. "Ethnic Italian Cookbook." Turkey Alfredo color photo and recipe marinara sauce with shells color photo and recipe; six additional recipes. Circulation: 107,000 MPD 30,337,500

(Continued on page 14)

Joe Viviano on TV

Joseph Viviano, president of San Giorgio-Skinner and chairman of the National Pasta Association, was not the only special guest at a meeting of the Labanon Lions Club. Cameramen from WTF-TV in Harrisburg showed up to tape Viviano's speech for a special report to be aired on public television's Mac-Neil/Lehrer Report in the near future.

Gregg Ramshaw, a producer from the Washington-based news program, said the footage shot at the meeting was to be included in an in-depth report on the state of the American pasta industry, which is currently in an uprise over illegally subsidized Italian imports.

"We wanted to do a special report on trade," said Ramshaw. "The pasta industry is a good example to use because of its current controversy, but it is a subject most people are familiar with."

Ramshaw said his crew has been following Viviano for several days, shooting various background footage. Ramshaw will next travel to New York City to tape the other side of the argument, that of some of the importers themselves.

The entire segment is to be shown in September, as soon as the European community decides on whether or not to comply with an international ruling prohibiting the subsidizing of Italian pasta. It is those subsidies which Viviano maintains is unfairly crippling the American pasta manufacturing.



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

Product Promotion Report

(Continued from page 12)

Foodservice Marketing — February Healthworks restaurant — Our pasta seafood salad. "In addition to being popular with customers pasta salads are well liked by management. They are good menu items because of their low cost and short preparation time. And the eye appeal of the salads also make them a good impulse item for customers." Circulation: 106,689 MPD: 31,866,000.

Club & Foodservice — February, three-page story. Shapes described; Quantities to purchase, how much to cook; leftover uses. Four photos; five recipes. Circulation: 10,087. MPD: 2,243,440.

Promotional Theme: "American Cuisine"

This theme integrates pasta into the "new" American cuisine — which will be the food focus in the media in the year ahead. Actually, American cuisine focuses on American regional cookery with emphasis on the use of our native foods. — poultry, game, fish, fresh vegetables, seafood, etc. reflecting our food heritage. Pasta is a natural to add variation to fish chowders, chilis — and the all-American pasta salad. Our program would encourage the use of pasta in traditional recipes as well as in new recipes in pasta with favorite American foods. These will begin to appear in print during National Pasta Week which will be Oct. 6-15.



Paul A. Vermeylen, National Pasta Association representative to the Wheat Industry Council, calls attention to the editorial appearing in the July 26, 1983 issue of *Milling & Baking News*.

W.I.C. on Target

With a surprising but delightful suddenness, the Wheat Industry Council's message is being heard in a growing number of markets around the country. The Council's consumer education

program has virtually blossomed since early March when the organization's first two nutrition education advisers began making media appearances. Based on the initial appearances, the outlook is highly encouraging, with ten such education advisers selected, trained and now meeting with radio, television and other media personalities.

Video-cassettes

The Wheat Industry Council, in fulfilling a pledge to keep its supporters informed of program plans and progress, this month will release videocassettes to end product manufacturers — the producers of bread, sweet goods, pasta, cookies and crackers and other wheat-based foods — detailing media appearance schedules for the full year that just began on July 1 and providing a sample of live interviews actually conducted in the year just ended.

In explaining the nutrition education adviser undertaking at the recent annual meeting of the Independent Bakers Association, C. Joan Reynolds, the Council's executive director, described the concept as "non-paid, very visible and very powerful." Bakers and allied members in attendance were quick to agree with that assessment after viewing portions of television appearances in several major markets, including Chicago, Dallas/Fort Worth and Cleveland.

The 13 major market appearances to date confirm the wisdom of the Wheat Industry Council's decision to use nutritionists and scientists as nutrition education advisers for the consumer education program. They bring credibility and an ability to relate research findings to consumers and the media in easily understood language. The primary role of these advisers is to help correct the misconceptions about the caloric, protein and fat content of wheat-based foods. The approach varies according to individual markets, media used and the adviser. In a live appearance on a Chicago television show, for example, Dr. John W. Erdman, professor of nutrition and biochemistry at the University of Illinois, was asked to explain fiber's importance, to elaborate on what products are produced from "that amazing little kernel of wheat," and to comment on product myths. In Dallas/Fort Worth, Dr. Jeanne Freeland Graves, associate professor in nutrition

at the University of Texas, appeared on a women's television program to remind people not to avoid bread and other complex carbohydrates when dieting. For Dr. David R. Lineback, head of food science at North Carolina State University, the assignment in Cleveland included an evening television news appearance dispelling myths about calorie content of bread, cereals and pasta.

To Television

The Council this month initiates still another new concept in its nutrition education program — distribution of a videocassette news feature to more than 200 television stations in 100 markets. The news feature focuses on new research on calories, dieting and carbohydrates at the Clinical Research Center of the University of Vermont School of Medicine. The principal focus of this message is that all calories are not identical, and that because of the way in which calories from complex carbohydrates like bread are metabolized in the body, the actual weight gain is less. The overall presentation is quite impressive and professional.

To declare that the present stunning success of the Wheat Industry Council guarantees a consumer education program without future problems would be overly optimistic. Yet, current activities are a refreshing tonic after a long period of delays and disappointments, and should restore and heighten belief in the program's long-range potential.

RHM Sells Building

Ranks Hovis McDougall P.L.C. has entered a sale and leaseback arrangement on its newly built headquarters at Windsor. The property was sold for £14.2 million (\$21.6 million) to Scottish Amicable Life Assurance Society.

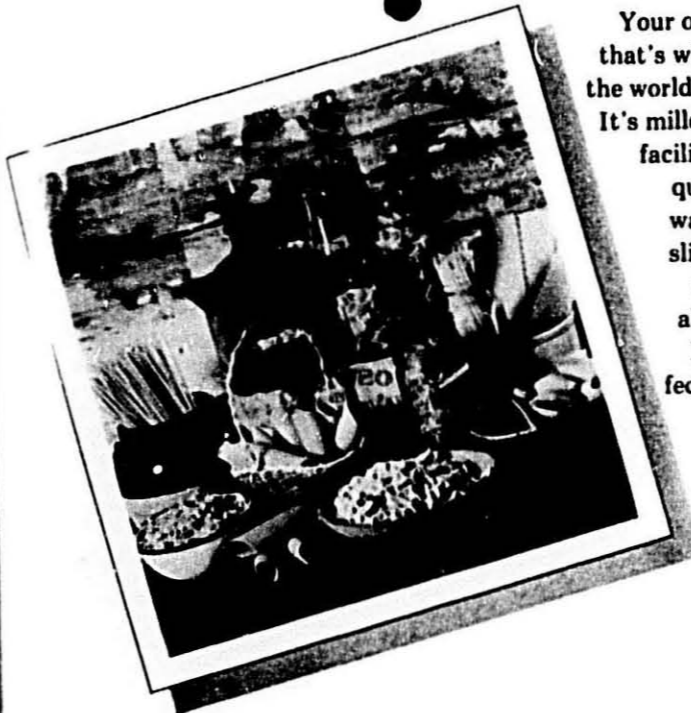
Recently RHM sold its agricultural services division to Dalgety P.L.C. for £42 million (\$63.9 million).

Bob Rodgers, RHM's director of finance, said proceeds from the recent sales "will be used to strengthen — and by acquisition to expand — its successful food businesses worldwide."

**N.P.A. Winter Meeting
Disney World, Orlando
March 11-15, 1984**

THE MACARONI JOURNAL OCTOBER, 1983

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BEARD ON PASTA



James Beard
Photo credit: Reanne Rubenstein

James Beard, whose new book, "Beard on Pasta" was recently published by Knopf and introduced at a party. . . .

"Did you get something to eat?" James Beard asked solicitously as each party guest stopped by to congratulate him on the publication of his latest book, *Beard on Pasta*.

Cookbook — writing colleagues, friends, and the press eagerly passed the long butcher-block countertop in Beard's kitchen, were handed a plate of steaming pasta, and then selected from close to a dozen sauces to heap on top.

But Beard himself, dressed in jeans and a comfortable pullover, was quite relaxed. After all, this is his 20th cookbook, and he's not exactly a newcomer to entertaining.

No sense in getting upset about having some friends over to eat," he explained to a friend who had just remarked upon his surprising calm amid 60 pasta-twirling guests.

Beard's new book is as much about having fun in the kitchen as it is about pasta.

"Consult your own taste and style and feel free to experiment," he says. "Take chances. We Americans have been intimidated for far too long by other people's opinions of what we should eat."

Beard observes that eating pasta is usually not a "mannerly" procedure, but who cares whether or not it's considered gauche to twirl your spaghetti on a spoon? If that's the way you feel most comfortable, then that's the way you should do it, he believes.

The dean of American cooking says that using a spoon is very convenient. "With it you can capture the last cream-covered peas or prosciutto, the bottom-of-the-bowl spoonful of basil-flavored tomato sauce or capers in olive-oil."

"Pasta," says Beard, "should be eaten with gusto."

It is with gusto that he approaches the subject in his newest book, casting a wide net over the flour-and-water world of noodles to include such unusual recipes as Elizabeth Andoh's Japanese udon — kneaded by tiptoeing on the dough with your foot; bread, noodles, made with yeast, pasta-stuffed roast chicken; and angel-hair pasta soufflé. There are also recipes for six-yolk French noodles, potato gnocchi, and spätzle.

Easy to Fix

Almost all of Beard's appealing pasta dishes are briefly and easily accomplished, but if 10 minutes rather than half an hour is all the time you have to cook, he gives you a chapter calling "Small Saucings," which will inspire the creation of a tasty sauce from whatever you have on hand.

This book demystifies the subject of pasta and encourages you to feel confident about your judgment in the kitchen.

James Beard is not a purist when it comes to making pasta from scratch. If you don't feel inclined to make your own, there are many commercial brands that are very good, he says, especially the Italian De Cecco.

He is also realistic about prices. If you don't care to pay the price of Parmegiano Reggiano, he suggests that you grate a fine domestic Cheddar or the less expensive Italian Caciocavallo.

"I refuse to accept that any cook (must) be bound by rules and restrictions," Beard says. "Your taste is your only guideline, and the more you follow your taste, the better cook you're going to be."

Here are some recipes from the new cookbook.

PASTA PRIMAVERA

- 1/2 cup fresh peas
- 1/2 cup tiny, new beans
- 1/2 cup sliced stalks thin asparagus
- 1/2 cup sliced mushrooms
- 4 tablespoons unsalted butter
- 1 cup light cream, warmed
- Lots of freshly ground black pepper
- 1 pound angel hair, linguine or even orzo
- Grated Parmesan cheese

Lightly cook the peas, beans, asparagus, and mushrooms in the butter until everything is crispy tender. Add the cream and pepper and cook down briefly. Cook the pasta, drain it, and toss with the sauce. Sprinkle with lots of grated Parmesan cheese. Serve to 6.

"This is a meat loaf that has thin pasta sheets scattered through it. The shells make a pattern like bits of tongue or pistachio nuts that are found in pate de campagne. They're fun, but if you can't find them try orzo, tubetti, funghini — any small, granular-shaped pasta. I've made this for years and years. It's a perfect dish to take on a picnic and slice on the spot. Hence the name."

ANGEL-HAIR SOUFFLE

- 4 ounces angel-hair pasta
- 6 egg yolks
- 3/4 cup shredded Cheddar, Parmesan, or Gruyere cheese
- 3/4 cup finely diced prosciutto
- 1/2 teaspoon freshly ground black pepper
- 1/8 teaspoon Tabasco
- 8 egg whites
- Cook and drain the pasta.

Put egg yolks in mixer bowl and beat until thick and butter-colored, as long as 5 minutes. Stir in the cream, prosciutto, pepper, Tabasco, and the cooked pasta.

In another bowl, beat egg whites until they form soft peaks that just begin to hold. Stir a large spoonful of the whites into the yolk mixture, then fold in the remaining egg whites gently but thoroughly, using a rubber spatula.

Pour mixture into buttered 2-quart soufflé dish and smooth top with spatula. Draw a circle with a finger on the top of the soufflé about 2 inches from the rim. This will make the center higher than the side to form a cap.

Bake in the center of a preheated 375-degree oven 15 to 20 minutes. Serves 4.

ORGANIZATIONAL STYLES



Will Phillips

Will Phillips, Senior Associate, Director of Certification Programs for Adizes Institute, Inc. lead a dynamic seminar on "How to Solve the Mismanagement Crisis", based on a book written by Ichak Adizes. Professor Adizes is an Israeli born in Yugoslavia. He teaches at the Graduate School of Management at the University of California in Los Angeles and at Tel Aviv University.

The basic premise is how to manage by recognizing that management is too complicated a process for any one individual to perform all the roles required. Each role requires a distinct style — a pattern of behavior which typically occurs in response to specific situations. The roles encompassed in the managerial process are in constant flux at any given time. Although a manager can perform all of those roles simultaneously, no one person can perform them simultaneously.

The necessary and sufficient roles that must be performed for an organization to be an effective and efficient operating organization are: to produce, to administer, to be an entrepreneur, and to integrate.

The producer (P).

The administrator (A).

The entrepreneur (E).

The integrator (I).

The Organizational Life Cycle

The Courtship Stage (paEi). At the courtship stage there is no organization yet.

The founders are basically dreaming about what they might do.

The Infant Organization (Paei). There are several signs that indicate when the organization is "born". There is a payroll to be met, a place is rented, or the founder resigns his or her previous job.

The Go-Go Stage (PaEi). This stage is analogous to the baby who can finally see and focus. The whole world opens before its eyes and everything looks like an opportunity. Only in retrospect do managers realize that some opportunities are threats that should have been avoided.

The Founder's Trap.

While the motherlike commitment of the founder is necessary for the survival of the Infant organization, it becomes dysfunctional after the Go-Go stages. The loving embrace becomes a stranglehold.

The Adolescent Organization (pAEi).

When the Administrative role (A) increases in importance, more time is spent on planning and coordinating meetings. A computer is installed, a consultant or salaried administrator is brought in. Training programs are developed, and labor policies established. All these cost money and take time away from producing results (P) in the short run. Top management might refuse to allow the decline in P. In that case, the organizational climate changes and adversely affects the entrepreneurial spirit (E); people's growth aspirations are depressed. They spend the time required for planning the "how" at the expense of analyzing the "why".

The Prime Organization (PAEi)

The Prime Organization knows its annual goals, and it has a results orientation (P). Furthermore, it has plans and procedures to achieve efficiency and to repeat its successful operations (A). At the same time, it has not lost its awareness of what is happening "out there"; it knows the opportunities and threats. It has long-term goals and strategies, too. While in the Go-Go organization the rate of growth in sales and profits is helter-skelter, these rates are stable and predictable in the Prime organization.

Staying in the Prime stage is not assured, however. Factors such as age, market share, and functionality of the organizational structure come into play.

Middle Age: The Stable Organization (PA ei)

As the entrepreneurial role (E) declines, the organization mellows. It is still results-oriented and well organized. Also, there is less conflict than in the previous stages; the decline of E permits the growth of I.

When things stop growing, they begin to die.

The Twilight Years: The Aristocratic Organization (pAei)

The decline in entrepreneurial spirit (E) has a long-range effect: eventually the P role, the orientation to achieve and produce results, declines. As people dream less about the long run, their achievement drive for the short run inevitably suffers too. They produce results, but the "stretching" is not there. The short-term, relatively assured results take over, and the seeds of mediocrity are planted.

In the Aristocratic organization, form counts very much: managerial uniforms; mode of addressing each other; mode of speech; where to meet. Mergers and acquisitions take place as the Aristocratic organization becomes cash-heavy.

The Bankrupt Aristocracy (pA-I)

The stable organization's loss of entrepreneurship (E) is reflected in the declining production (P) of the Aristocratic organization. If the Aristocratic organization does not do anything significant about this situation, its E will disappear altogether and its P will be hardly noticeable. It will arrive at the stage of Bankrupt Aristocracy (pA-I).

Summary

A model for codifying (PAEi) organizational behavior has been presented. A life cycle with distinct patterns of behavior permits us to predict the roles that need to be developed if an organization is to remain healthy. Possible retreatments are suggested in the book *How to Solve the Mismanagement Crisis*.

More next month on what to do about it.



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REDISCOVERING YOUTH:

How to Identify Opportunities Within the Current Portfolio

In our work with many different industries, we often see companies that have grown significantly in markets that on the surface appear mature. More often than not, these companies had corporate development plans that created and nurtured that growth. Conversely, it often appears to us that a slowdown of growth is due to a lack of attention to innovation by companies and the superficiality of their corporate development efforts rather than to limits inherent in the market place.

In the course of our work with clients, we have developed a system, or approach, for systematically and thoroughly identifying new opportunities within a mature industry.

The first part of this approach is the development of a Strategic Opportunities Profile.

A Strategic Opportunities Profile enable a Chief Executive Office to compare the major opportunities available to all of the corporation's business units, not just those in the growth industries. Consequently, it enables a much sounder allocation of effort and capital.

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

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

The successful completion of a Strategic Opportunities Profile requires thoughtful preparatory work:

- A user survey
- A competitive dissection
- A technology assessment
- A profit sensitivity analysis

Survey of Users. Part of the rationale for conducting a user survey is a fascinating study completed at the Sloan School of Management. (Eric A. von Hippel, "Users as Innovators," *Innovation/Technology Review*.) The study examined the source of innovations within U.S. industry. It found that "60-80% of the products sampled were invented, prototyped, and utilized in the field by innovative users before they were offered commercially."

The study details a minor horror story of U.S. innovation. It documents the fact that most manufacturers were so far out of tune with the needs of their users that they failed to recognize worthwhile innovations when they appeared and resisted implementing them until market forces required them to comply. In many cases, users brought worthwhile innovations to the attention of manufacturers and were ignored.

This lack of recognition of innovation by users is one reason why mature industries are so often invaded by outsiders who find growth there. For example, the Japanese showed the U.S. motorcycle industry that their consumers were not limited to men with "born to be bad" tattooed on their arms. In the process, they rekindled rapid growth for street motorcycles and created several new off-the-road products as well.

There are significant differences between conventional market research and a user survey. Conventional market research typically addresses current products and seeks rigorous, quantifiable results. A user survey searches out user innovations and un-



Kathleen Crispell Blackmer

recognized market needs. An effective user survey requires highly skilled interviewing of user company executives who are rarely reached by conventional market research surveys or suppliers.

Interestingly, the Sloan School study concluded that one of the causes of failure to recognize valid user innovations is the approach followed by salespeople in their customer contacts. The sales force is trained to go in order and move on to the next customer. In contrast, a user survey requires the exploration of where the product (or service) could be improved or modified, a subject salespeople usually prefer to avoid.

Thus, the user survey must be undertaken by an expert who is searching for new strategic opportunities. He should come equipped with curiosity, not preconceptions. One route to failure is to use someone from within the industry who already knows all of the things "which cannot be done." So the user survey is far from routine. Excellent profit results.

THE MACARONI JOURNAL

Competitive Dissection

The second step of preparatory work for the Strategic Opportunities Profile is a competitive dissection. Incidentally, the choice of the word "dissection" is deliberate; it describes the aggressive intent of the analysis.

The purpose of the competitive dissection is to identify the strategic opportunities that result from this analysis. How many executives know the answer to such question as:

- What is your principal competitor's cost structure?
- What competitors have financial problems and will not reinvest to maintain their competitive position?
- Which competitors are tied to elaborate corporate management systems and cannot fight back without cutting through numerous layers of red tape?
- Which segments of the industry offer the least competition?
- What are the backgrounds and attitudes of the senior managers of the major competitors?

A study of the competition in a mature industry often reveals surprising weaknesses and important opportunities for renewed growth.

For example, we recently completed a Strategic Opportunities Profile for a company in a low growth segment of the aluminum industry. A study of the integrated aluminum companies shows they had a surprising inability to compete in rapid turnaround jobs for a wide variety of users for whom speed is more important than price. The strategic opportunities for our client were obvious. The competitive dissection led to our client developing a niche identified in the user survey and competitive dissection. The client is now growing three times faster than the industry overall and enjoys equivalent profit.

Technology Assessment

Technology is a vital factor in creating product differentiation and value added through improved performance, features, quality, or application. It may also directly improve cost structure and competitive economics.

When we help companies in a technology assessment, we find it useful to assign technologies to one of three categories.

The base technology is often the technology upon which the industry was founded. Typically, the base technology is well known, and most companies within the industry are using it. For example, a base technology in the manufacturing of data terminals is integrated circuitry and keyboard manufacturing. Every competitor is familiar with the technology, it is described in undergraduate textbooks, and knowledge of it is a requirement for competing in the industry.

Key technologies are generally still under active development within the industry. Gaining an advantage in a key technology can provide an important differentiation in product performance or manufacturing economics.

Different companies have different key technologies. In the data terminal industry, one competitor's key technology might be the networking architecture, while another's might be a manufacturing process for the large volume assembly of complex equipment.

Pacing technologies are in an early stage of development and have major potential for the future. Some, but not all, of today's pacing technologies will be tomorrow's key technologies.

We find that many companies tend to over-invest in base technologies. This is often a serious error. Generally, any further breakthrough in a base technology will be costly, will have only marginal competitive impact, and will do little to enhance a business' or product's competitive position.

Technologies, like products, have life cycles. What frequently occurs is that the old base technology begins to fade away, the key technology then becomes the new base technology, and a new key technology is formed from what was originally a pacing technology.

Companies, sometimes entire industries, may have difficulty identifying pacing technologies before it is too late. The Swiss watch industry was severely hurt, first by other competitors' low-cost mass production and marketing approach, and later by electronic digital technology and quartz movements. Many of the old-line toy manufacturers failed to foresee the impact of "intelligent" electronics on the toy and game industry.

Thus, an important step in preparing for a Strategic Opportunities Profile is a technology assessment to develop

an understanding of the roles that different technologies will play within an industry.

Strategic Opportunities Profile

The profits of some businesses are sensitive to import quotas or to worldwide commodity prices. The profits of other businesses are highly sensitive to changes in volume. Still others are particularly sensitive to changes in gross margin. In each business, there are usually two or three principal levels that dramatically move profits. The profit sensitivity analysis identifies these levels and the components of costs and their behavior.

Despite the much promoted "experience curve," there are clearly many industries in which profits do not depend on a company's being the lowest cost producer. Low-cost production helps, of course, but is not essential in many mature industries. Economies of scale can be and are different depending on the functional characteristics of the business, its market and technological position, and its operating structure.

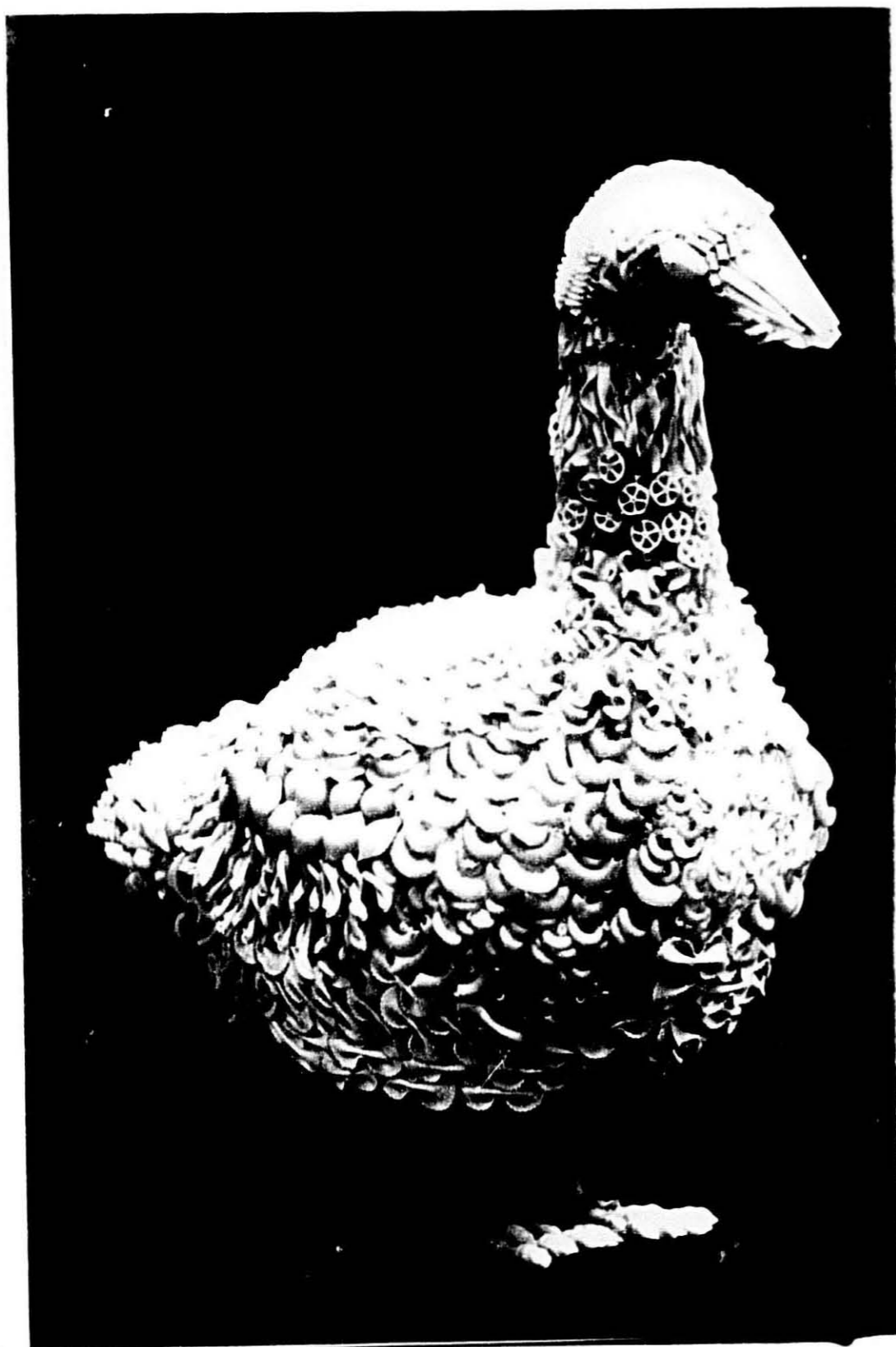
In some mature industries, companies have prospered by adopting a differentiated position. This differentiation can take the form of product superiority or differences in operating structures.

Interestingly, a number of studies of successfully differentiated product lines indicate that these products grew faster, commanded higher prices, and brought higher margins than did their undifferentiated cousins. Additionally, the differentiated products operated with lower asset intensity, generating higher returns on net assets.

Thus, a business that is not a low-cost producer in a mature or aging industry does not necessarily have to accept lower margins or adhere to a prescriptive strategy of seeking volume based on lower prices.

The foregoing discussion has described only the preparatory work for a Strategic Opportunities Profile. The Profile itself is a two-day management meeting held away from headquarters. We invite as participants business unit management, the individuals who completed the preparatory work, and Arthur D. Little staff members who are specialists in various industry or functional areas.

(Continued on page 24)



The pasta goose lays a golden egg, too.

Pastas – let's tell it like it is.

ADM

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

Rediscovering Youth

(Continued from page 21)

The meeting is carefully organized to combine creativity and an orderly search for strategic opportunities. The way in which the meeting is conducted is essential to its success; the sequence of discussion must spark innovation by mixing ideas and people together in a creative atmosphere. Innovations are encouraged by a steady flow of thought-provoking data derived from the preparatory work. Improvements on ideas introduced earlier commonly arise by looking at the linkages between opportunities and the profit structure of the business.

There are seven basic elements

We start with a discussion of the social, political, and economic trends that are expected over the planning period. An examination of these trends and the results of the user survey may indicate, for example, an expected change in user buying habits. Much of the data needed is already in the client's data base or can be provided by us. We direct the discussion to highlight the factors which will have the greatest impact on the client's profits.

We then discuss the principal profit sensitivities of the business. This is always interesting, as many of the clients automatically assume their businesses have significant volume sensitivity, when financial statements may show there is little. Or, they may assume there is a learning curve effect, when none exists.

Next we assess the technological changes that are likely to occur. This allows new technological opportunities or threats to be identified. Throughout these discussions, opportunities are noted and listed on flip charts, and each chart is taped to the wall. The list grows longer, the linkages between opportunities appear, and ideas begin to emerge.

The fourth element is the discussion of the competitive dissection. We are surprised at how little time U.S. companies spend analyzing major vulnerabilities of their competitors. In most other areas of human activity, such as sports, politics, and war, we study our competitors carefully so that we can exploit their vulnerabilities. For some reason, most U.S. companies do not rigorously assess their competitors, although many Japanese companies do so as a matter of routine. The primary objective of this phase of the Strategic

Opportunities Profile is to identify opportunities that result from the weaknesses of competitors.

We then discuss the results of the user survey. The findings usually surprise the business unit management and encourage them to renewed innovation. And, frequently, this leads to the identification of logical and profitable product line developments.

The results of the user survey also help in the analysis of bases of competition in the industry. The bases of competition are those factors which make the difference between the winners and the losers in an industry. There are almost always different market segments within mature industries, and the bases of competition usually differ significantly in each of these segments. It is necessary to identify the bases of competition in each segment and to match these against the strengths and weaknesses of the competitors. This discussion leads to the identification of new opportunities and provides a perspective on the relative attractiveness of those opportunities already identified.

The final element in the Strategic Opportunities Profile is a discussion of what we call "blue sky" opportunities. These are the "wild card" imaginative ideas that have been conceived but not yet fully discussed. By this time, the participants are usually feeling open enough that they are willing to suggest purely blue sky opportunities. This often leads to the uncovering of more down-to-earth possibilities or to the reinforcement of several of the strategic opportunities that were listed earlier. In contrast to the more traditional "brainstorming," these opportunities can be evaluated in light of the factual information developed in previous steps.

The Strategic Opportunities Profile develops a list of opportunities that a business in a mature industry can utilize to achieve renewed growth.

During the second day, the participants are divided into teams. Each team is asked to develop a plan to exploit the opportunities it believes are best and to estimate the cost of implementing its program. The team discussions that result enable the linkages between opportunities to be developed more thoroughly and provide time for fuller discussion of the strategic opportunities and how they should be ranked.

Innovation Budget

Following the team presentations and preliminary agreement on a common program, the cost estimates prepared by each team are used to prepare a vital part of the plan, the Innovation Budget. The Innovation Budget is a pool of funds earmarked for the exploration and nurturing of strategic opportunities identified during the Strategic Opportunities Profile.

The Innovation Budget supports continued development of the strategic opportunities that were identified, until one of three events occurs:

1. One year passes and a new Strategic Opportunities Profile is developed, resulting in a new Innovation Budget.
2. A strategic opportunity is developed to the point where success is in sight, and the normal operating budget and capital appropriation routine can take over.
3. The strategic opportunity is written off as not worth further development.

Because the Innovation Budget covers all types of strategic opportunities, from a new product concept to a study for a new pricing technology, it is much broader and different than a research and development budget. The Innovation Budget is a vital connecting link between the identification of an opportunity and its successful exploitation. Properly used, it should feed well-defined projects into, for example, both the R&D process and the acquisition plan.

Without the encouragement and control provided by the Innovation Budget, attention to innovation may rapidly under the pressure of today's business and the monthly profit and loss statement may once again become the sole focus. The Innovation Budget requires programs, dates, performance milestones, and should be monitored and enforced by top management so that innovation and renewal are understood to be of major importance to the corporation.

Growth Through Renewal

To summarize, a reasonable corporate development system should examine the opportunities in all parts of the corporation before funds are allocated. It should not be assumed that a mature business unit has limited opportunities for growth, or that the need for research and development declines as an industry ages. In fact, we

believe that during the next 20 years many corporations will be hard pressed for growth unless opportunities are discovered within their existing business units. Common sense tells us that in today's mature U.S. economy this is the way it must be. Managers must use tools like the Strategic Opportunities Profile and the Innovation Budget to make certain that the large, mature business units that provide most of their profits continue their development. One of the keys to success in the 1980s will be our ability as managers to engender successful growth through renewal of these businesses.

Dearden Defines Strategic Planning

Describing strategic planning as the "road map" upon which an organization must outline its goals and objectives for a specified time period, William Dearden, Chief Executive Officer of Hershey Foods Corporation, Hershey, Pennsylvania told members of the National Food Brokers Association that the uncertainties of today's economy make sound, long-range planning all the more vital and necessary. "The confusion concerning the state of the economy, even in the minds of so-called experts, is no reason to cop out and do nothing," Dearden said. "It's time to get down to work and start getting some control over our own destiny."

Speaking in Boston on August 5, to more than 60 participants at NFBA's Confectionery Dinner, an annual event sponsored by the NFBA Confectionery & Foods Sales Committee, Dearden explained in detail how extensive and meticulous strategic planning at Hershey, over the past seven years, has contributed to Hershey's growth into the international food market and led to an increase in sales from \$76,000,000 in 1975 to \$106,000,000 in 1982. Additionally, sales showed a 272 percent increase over the same time period.

Grueling Process

Though oftentimes a "grueling and time-consuming process," Dearden said, strategic planning is effective in that it forces its participants, usually top executives of the organization, to rethink the business as objectively as possible, develop a business philosophy, and then formulate a plan for fu-

ture growth which embodies that philosophy. "The biggest stumbling block in strategic planning," he added, "is that those involved never establish the basic philosophy of the organization. They always want to get to budgets and numbers, and forget to address their reason for being."

Investigate Trends

When devising a strategic plan, Dearden advised, be sure to thoroughly investigate trends which may influence future operations and decisions. Specific trends currently affecting the food industry, according to Dearden, are the significant consolidations and mergers of major companies, the proliferation of computer technology as exhibited by scanning devices and the Uniform Communication Standard, alterations in distribution patterns, and "unprecedented changes" in manufacturers' approaches to marketing.

These developments, combined with inflation and high interest rates, over-regulation of business, the effects of the recession, and what Dearden described as, "the ever increasing tax burdens which have stifled investments," can all be confronted effectively with a working strategic plan, he said.

Benefits

In addition to giving an organization a sense of direction, a strategic plan has a number of other benefits, according to Dearden. It (1) narrows the sphere of decision-making; (2) speeds up decision-making; (3) eliminates frustration and confusion because managers know exactly what's expected of them; and (4) creates continuity, even in times of management changes, because goals are firmly established.

What strategic planning IS NOT, Dearden warned, is a "panacea." "It does not make your decisions any easier to wrestle with," he said.

NFBA's Confectionery Dinner is one of a series of workshops or seminars sponsored by the NFBA to provide continuing education to its 2,500 member firms.

Catelli Has a Good Year

Catelli of Montreal is a division of John Labatt, Canadian brewer, food manufacturer and agri-business factor. The Corporation has a 45% partnership interest in the Toronto Blue Jays

Baseball Club; 46.4% share interest in Catelli-Primo Limited, packaged food producer in Trinidad.

The following statement is from the annual report to shareholders.

Catelli produces and markets a wide range of grocery products in Canada and the United States.

In Canada, the division is the leading producer of pasta, aseptic puddings, spaghetti sauces and has, on a regional basis, significant market shares in other product lines. Catelli's Canadian products also include pickles, jams, marmalades, table syrups, ready-to-serve soups, packaged flour and other cereal-based products. In addition, fresh mushrooms are produced and marketed in Quebec through grocery retail outlets. The division is also a major supplier to the retail food trade for a variety of custom-packed products.

In New England, soups, quality processed meats and specialty condiments are produced and marketed.

Catelli's seven Canadian plants are located in Montreal, Carignan and Saint-Hyacinthe, Quebec; Lethbridge, Alberta; and Toronto and Delta, Ontario. The four United States facilities are located in Manchester, New Hampshire; Portland, Maine; and Essex Junction, Vermont.

Grocery Industry Soft

The grocery products industry in Canada was characterized by overall market softness during the year due to unfavorable economic conditions and, as a result, an intensely competitive marketing environment existed. Catelli's performance in fiscal 1983 was slightly ahead of the previous year. In several product categories, notably pasta, family flour and spaghetti sauces, market growth was strong and Catelli participated in this growth. However, market softness in other areas limited volume and earnings gains. Performance was also hurt by a thirteen-week work stoppage at Catelli's Saint-Hyacinthe, plant. Catelli's fresh mushroom operation, Terra, improved its earnings performance in fiscal 1983. In New England, sales and earnings, which were disappointing in the early months of the year, responded to new sales initiatives and strengthened throughout the remainder of the period and an improved performance was achieved for the year.

(Continued on page 26)

Catelli Has Good Year

(Continued from page 25)

Catelli increased its product line as several new products were launched. "Croustines," an extruded cracker, and "Pizza Pronto," a convenience product for homemade pizzas, were launched in Quebec. "Catelli Plus," a protein enriched pasta, was introduced into the Ontario market. Recently, four flavours of "Laura Secord" brand yogurt were launched nationally. The "Laura Secord" yogurt is the only shelf stable yogurt made in Canada and responds to consumer demand for a wider variety of single service products. "Laura Secord" yogurt is located beside the "Laura Secord" puddings in grocery stores.

Catelli, having maintained its strong position despite market softness and intense competitive activity, anticipates gains in sales and earnings in fiscal 1984.

Chesebrough-Pond's Reports Lower Earnings

Net income of Chesebrough-Pond's Inc. for the second quarter of 1983, as anticipated, was 13.5 per cent lower than in 1982's second quarter, it was announced by Ralph E. Ward, chairman and president. Second quarter sales were up slightly over last year's second quarter, he added.

Primary factors, with respect to net income, were continued increases in the advertising investment for the company's leading brands, together with a decline in operating profit for the Bass Division and continued declines in many foreign currencies in relation to the U.S. dollar.

Commenting on the second half of 1983, Mr. Ward said, "Chesebrough's aggressive commitment to increased marketing investment in the U.S. and abroad, combined with the balance we have achieved through diversification, should enable the company to achieve its 28th consecutive record year in 1983," Mr. Ward said.

Packaged Foods Division

Sales exceeded the division's outstanding second quarter of 1982. In the spaghetti sauce category, competitive activity spurred additional sales growth, and Ragu sauces, which have by far the largest share of the category, benefitted strongly. Ragu Homestyle spaghetti sauce, introduced less than

two years ago, now ranks second in category sales to Ragu traditional spaghetti sauce, the long-time category leader. The latest expansion of the Ragu Pizza Quick business, announced in the second quarter, is a boxed pizza kit, including in one package everything a consumer needs to make pizza at home. New product development activities continued during the quarter as the division seeks to capitalize on opportunities in the packaged foods business.

Lipton Goes on the Offensive

Business Week Magazine reports that with Nestle, P & G, and Campbell threatening its turf, Thomas J. Lipton, Inc. is moving on all fronts to increase sales. By next year, Lipton expects to be fighting at least one and perhaps two strong competitors in tea and soup, which last year made up about 55% of the Englewood Cliffs (N.J.) company's \$913 million sales and 70% of its \$56.6 million net income. Consumer-products giant Procter & Gamble Co. acquired Nabisco Brands Inc.'s Tender Leaf tea operations in 1982, and in August began testing new packaging and advertising for the line. Observers predict that P & G will reformulate the brand using a new flavor technology it has patented for tea.

Nestle Co. is also moving into Lipton's territory, testing a bagged tea for the first time. And in soup, Campbell Soup Co., a leader in canned products, is plunging into the \$360 million dry-soup-mix category that Lipton dominates. Since January, Campbell has tested a line of all-natural instant soup and recipe mixes.

31 Year Record

The resulting melee could threaten Lipton's unblemished 31-year record of revenue and profit gains. Moreover, Lipton is grappling with competitive battles on other product fronts. In the bottled-salad-dressing business, Lipton's Wish-Bone is locked in fierce combat with Kraft Inc., and Anderson, Clayton & Co.'s Seven Seas brands. Its Good Humor ice cream division, acquired in 1961, is aiming to keep sales from melting by introducing new products to counter such popular novelties as Chopwich and by expanding distribution into supermarkets. "There's no doubt that we will have to spend a lot of money to protect ourselves," admits Dolph W. von Arx,

senior vice-president for marketing. "But we have a big bankroll in London [Unilever's headquarters]. We'll part with it to hold our positions."

In the instant-soup business, Lipton has started to make changes. A 10-calorie instant soup called Trim will be added to the established Cup-a-Soup line. Reformulations and new packaging are rumored to be in the works for other soups. Lipton is also showing its muscle to interlopers. In the Campbell test markets, Lipton salespeople quickly stormed stores and pasted high-value coupons to its soups. Says Herbert M. Baum, Campbell's vice-president for marketing: "They are tough competitors who protect their franchises at all costs."

To gain more clout with supermarkets, the company earlier this year revamped its sales staff. It merged the Lipton sales force with that of Lawry's Foods Inc., a West Coast seasoning and Mexican food company acquired in 1979. And Lipton will have added 175 in-store merchandisers—who set up displays and check shelf arrangements—by the end of the year.

Lipton will increase ad spending about 20% this year, to \$66 million. Next year the boost is likely to be even higher, as more products go into national distribution.

The Hidden Persuaders

An executive of Golden Grain Macaroni Co. showed the National Grocers Association meeting in San Francisco how messages are affixed in people's minds without the viewer or reader being aware their subconscious is being penetrated.

Advertising, said Dr. Mar Dedomenico, is "one of the most expensive manipulators in the history of the world."

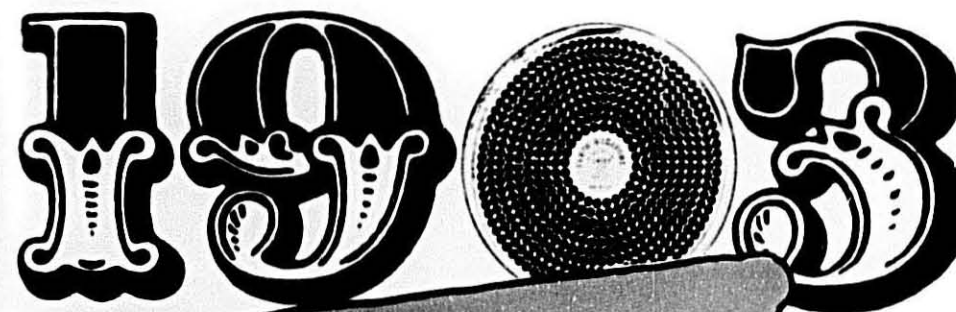
Dedomenico, 45, a member of the family that owns and operates Golden Grain Macaroni, lives in Seattle and is a cardiovascular surgeon as well as senior vice president of the San Leandro-based food company.

Golden Grain sells Rice-A-Roni and Noodle Roni products and owns the Ghirardelli Chocolate Co.

Dedomenico narrated a spectacular audio-visual show that entranced hundreds of the 3000 or so grocers attending the convention in Moscone Center

(Continued on page 28)

THE MACARONI JOURNAL



On our 80th anniversary of producing extrusion dies for the food industry, we re-dedicate our policy of assuring quality, workmanship, service and extruded results. In the years to come it is our hope that you will take advantage of this tradition and dedication.

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America's Largest Macaroni Die Makers Since 1903 —
With Management Continuously Retained in Same Family

The Hidden Persuaders

(Continued from page 26)

Using slides of print ads for every decade starting with the 1920s and adding radio and television commercials as they came along and developed, Dedomenico showed that, except for the prices, grocery ads in newspapers have not changed much in the past 60 years.

But he also flashed some liquor ads and showed how they have been subliminally sneaking in words like "sex" in ways that are virtually invisible to the naked eye.

Dedomenico illustrated that declaration with hugely magnified examples of some ads.

"Subliminal messages are aimed at the subconscious," he said. "New ideas start in the subconscious. Images and opinions are stored in your subconscious."

He also showed how some recording groups—and some advertisers—implant messages without the conscious awareness of the viewer or reader.

"The Beatles were the first to use subliminal audio effectively," Dedomenico said, showing slides and film of the famous quartet while playing a cut from one of their albums that sounded like, "Oompaa . . . oompass."

When he slowed the tape, another phrasing clearly emerged:

"Smoke pot . . . smoke pot . . . everybody smoke pot."

He used film and tapes of Pink Floyd, Kiss and Devo to demonstrate other unusual messages that intrigued the grocery executives, many of them of middle age.

"Why can these crummy rock groups get people waiting in line for days to see them and you can't get people into your stores?" Dedomenico asked.

Learn Psychographics

"You have to learn psychographics," he continued. "You must create the loyal customer."

In a brief interview after his hour-long presentation, Dedomenico said, "I'm definitely against the use of subliminal advertising, although subliminal messages may have a place in teaching kids with learning difficulties."

"People today don't need money—most people have money—but they do need self-esteem. Computers are taking too much of the personal touch away from just about everything."

Creamette Campaign

An innovative introductory promotion campaign inaugurated last month in Kansas City by The Creamette Co., pasta manufacturer with headquarters in Minneapolis, is an envelope containing a validation card that entitles the customer to a "Tried and True" cookbook, a coupon to be redeemed for a free 7-oz package of Creamette macaroni, and 12 more coupons to be redeemed at the rate of one a month for various Creamette products in various sizes. The envelope containing the coupons is the color and design of a Creamette product package.

The coupons to be redeemed each month are good only when used by the family receiving the packet and must be signed to be valid. They can be redeemed only in the month indicated for the product specified.

The September coupon in the packets delivered by mail provides 65¢ off on a 2-lb package of Creamette spaghetti; October, 50¢ off on a 1-lb package of fettuccini; November, 42¢ off on a 7-oz package of macaroni; December, \$1 off on a 1-lb package of lasagne; January, 1983, 60¢ off on two packages of 1-lb spaghetti; February, 65¢ off on a 2-lb package of macaroni; March, 60¢ off on two 1-lb packages of extra-wide egg noodles; April, 30¢ off on a 1-lb package of vermicelli; May, 90¢ off on a 1-lb package of mostaccioli; June, 60¢ off on two 1-lb packages of jumbo macaroni; July, 60¢ off on two 1-lb packages of dumplings; August, 30¢ off on a 1-lb package of medium shells.

Each of the coupons for monthly redemption has a detachable section with a recipe featuring the special for that month. Value of the coupons over the 12 months is \$7.12, in addition to the free 7-oz package of macaroni and the cookbook.

Creamettes and Hellman's Team Up

Hellmann's/Best Foods Real Mayonnaise and Creamettes Macaroni and Spaghetti are featured in new ad offering two quick and easy main dish salad recipes. Striking photo is designed to encourage consumers to make dishes for their late summer meals. Ad will run in September 13 and October 4

issues of FAMILY CIRCLE and other women's magazines. DFS, New York is the agency.

Pillsbury Posts Records

The Pillsbury Co. achieved record sales and earnings for the 12th consecutive year in the fiscal year ended May 31, it was announced by William H. Spoor, chairman and chief executive officer.

"Fiscal 1983 was a challenging and exciting year for Pillsbury and on balance we are pleased with our strong operating results in both quantitative and qualitative terms," Mr. Spoor said. "Success was achieved despite a difficult world-wide economic environment."

Net income of Pillsbury in fiscal 1983 totaled \$138.9 million, equal to \$6.39 per share on the common stock, up 2% from \$136.3 million, or \$6.29 per share, in fiscal 1982. Net sales aggregated \$3,685.9 million, up 9% from \$3,385.1 million in the previous fiscal year.

Fiscal 1983 earnings include a provision of \$8.2 million net for a write-down of Burger King assets in the second quarter, and a gain of \$4.1 million in the fourth quarter from sale of the Burger King office building. Fiscal 1982 earnings included net gains of \$3.7 million from the sale of Wilton Enterprises, and a \$5.3 million from sale of the Wheat Nuts Product line and from settlement of antitrust claims against corrugated container manufacturers.

Consumer Segment Up

Operating profit in fiscal 1983 was up 4% from the previous year, respectively. The Agri-Products segment operating profit was up 43% from the previous year.

"Agri-Products," Mr. Spoor said in fiscal 1983, "experienced volume profit gains were not sufficient to offset the continuing depressed results of the commodity business—primarily the transportation segment of Grain Merchandising."

The Consumer Foods group, Mr. Spoor added, "produced a fine performance. The group's strong management expects to maintain momentum in the business with new products."

(Continued on page 30)

THE MACARONI JOURNAL

THE GREAT PRODUCT DESERVES ANOTHER... ... and great products begin with EGGCO®



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Pillsbury Records

(Continued from page 28)

ucts, line extensions and acquisitions." The Restaurant group, he added, produced "excellent results" with Burger King average sales per domestic company unit showing real sales growth of 10%.

"We are looking forward to the finalization, early in 1984, of our planned acquisition of Haagen-Dazs which will add premium quality ice cream products to Pillsbury's business portfolio, and provide another unusual growth and profit opportunity," Mr. Spoor said.

"In retrospect, fiscal 1983 proved to be a gratifying year for Pillsbury. We are enthusiastically looking forward to fiscal 1984."

The Importance of Packaging

Packaging is "one of the most important elements in a marketing mix," said Herbert M. Baum, vice president, marketing, of Campbell Soup Co., before the Package Designers Council in New York City. Baum described new Campbell products using innovative packaging and discussed some past successes and failures.

Among Campbell's new products, Baum said, is LeMenu, a premium instant-dinner line that can be heated in microwave ovens. The line, which went on allocation because of its popularity when introduced in the West and Southwest, was introduced in the East two weeks ago. It's one of Campbell's responses to major societal factors that include inflation, working women, nutritional concerns, product quality concerns, smaller households and more eating away from home, Baum said.

Response to Change

Another Campbell response to demographic changes was its Soup for One line. When the firm started to sell the line with an essentially institutional label, consumers mistakenly believed they were paying more per ounce for its regular soup and "sales plummeted." They picked up, though, when a picture on the label conveyed the impression that the soup was "upscale" and different.

Campbell's Prego tomato-sauce line, said Baum, is a clear example of a

label's reflecting a marketing strategy. The label, which depicts a plate of spaghetti with sauce on top, convinces consumers that the line is "different from and better than" its competitors.

Another Campbell product, now in test marketing in the Midwest, is its V-8 vegetable juice in a Purepak container, which resembles a milk carton. Not only does it have a good shelf life, he said, but it is economical, easy to transport, convenient and easy to store.

Experimenting

Campbell is experimenting with a plastic package with a peel-off top, which has not yet been introduced into the marketplace. Now in home testing is a shelf-stable package shaped like a bowl containing soup, which can be popped right into the oven. In test marketing, he said, are salads in plastic containers that are sold near the yogurt in the freezer case.

Campbell, said Baum, is looking for alternatives to cans because of the cost of tin-plate and in the interest of using more contemporary, convenient packaging. Innovation in packaging will be an important part of marketing strategy going into the 1980s and 1990s, Baum said.

Innovation in packaging is not necessarily well received, he observed. For instance, three years ago, Campbell picked 15 Campbell soups that had 100 calories or less per serving and put a label across the top identifying them as "lite" soups. "Nobody bought them because they thought we had changed the product."

Similarly, responding to complaints from David Ogilvy of Ogilvy & Mather, that Campbell's regular soup can lacked appetite appeal, Campbell experimented three years ago with new soup labels. Ten labels, some showing pictures of soup, were tested. "We found the existing label won hands down."

Campbell has not yet decided how to make its soup labels "work harder," Baum said. In this case, apparently, "you just can't overcome tradition and familiarity."

For its Chunky soups, Baum said, Campbell wanted a label that would differentiate them from its "regular" red-and-white-label line. The design it chose depicted soups. Five years ago, however, in response to a directive from its legal department, Campbell

removed the soup pictures from the labels.

"Sales fell like a rock," Baum said. Volume was restored a year later, when the lawyers' opinion was reinterpreted and Campbell returned to the use of a picture on the label.

Traffic Building Promotions

After evaluating print and electronic media ads from 29 countries including the United States, speakers at a Food Marketing Institute workshop on Traffic Building Promotions came up with a list of suggestions.

The summaries were given by J. Stephen Owens, partner in Anthony Long & Associates, New York, and R. L. Myers, vice president, advertising, for the Midwestern food division of Lucky Stores, Milan, Ill.

The recommendations:

—Develop a clear promotion plan well in advance, preferably for a year.

—Carefully budget your programs and control the cost.

—Develop files and catalogs to help select the best program for you.

—Analyze your competition and previous marketplace activity; include your employees.

—Plan your promotion programs to include both consumers and suppliers.

—Work in developing value-added programs to give yourself a lead on your competitors.

—If you run a scratch-and-win game, you should consider a probability card with more consumer appeal.

—Carefully determine realistic sales targets.

—Add suppliers into your programs to strengthen the appeal of a program.

—Expand your horizons when looking for new ideas. Look at other retailers. Randall's did, and they came up with a joint advertising scheme with Foley's department stores for the holidays.

—Do not hesitate to use a consumer panel on a regular basis.

—Integrate and overlap your promotion plans, and make sure that they are clearly part of your total communications program.

—Don't be imitative, don't be reactive; be proactive and you will enjoy the success you wish for.

(Continued on page 33)

THE MACARONI JOURNAL

Quality product... when you need it!

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For year-round super semolina service...



Seaboard Allied Milling
DEPARTMENT OF CARGILL, INC.



Traffic: Building Promotions

Continued from page 30

Holidays offer an opportunity to create general promotions as do anniversaries, Myers said. The latter need not be 25th, 50th, or 100th anniversary. One retailer, for example, had a 38th anniversary event, and then made the number memorable by offering a \$30,000 giveaway.

Too often the competitive factor is not given the attention it deserves, Owens said. "You should maintain a file on your competitor's historical promotion patterns just as you would on their pricing strategies. Try to determine patterns, timings and indications. Ask yourself which competitors seem to have a promotion strategy and which ones do not, which ones are reactive, etc."

By filing these points on the competition, a retailer will be able to anticipate what any competition might do if the retailer runs a particular kind of traffic promotion, or price campaign. "Not only will you feel more secure about your plans, you will be able to build in budget reserves to offset any of their plans."

N.P.A. Electronic Media Program

Pat Muldowney of Burson Marsteller reported at Silverado:

1. Network placements

GOAL: 4 network/syndicated TV shows

Achievements to date: 1

• HOUR MAGAZINE - Audrey Cross interview aired July 5 — pasta mentioned in relation to U.S. Dietary Guidelines discussion.

Agency has supplied background materials to Dian Thomas tentatively planning pasta food segment on Today Show in October.

Agency working with producers of the following shows for spokesperson placement for Edward Villela:

- MERV GRIFFIN SHOW
- EVENING MAGAZINE
- GOOD MORNING AMERICA

2. Newsclips

Achievements to date:

Production completed. Date for distribution: Fall
Edward Villela, James Beard,

Johanna Dwyer (Director of Francis Stern Nutrition Center, Boston), Dr. Edward Colt (Medical Advisor to New York Road Runners), Barbara Gibbons (United Features Syndicate food writer, cookbook author), Dr. Herbert Joffin (Professor of Obstetrics, Mount Sinai Hospital) Bill Davis (former U.S. Professional Ballroom Champion) participate in health-oriented series.

3. Television PSA's

GOAL: Distribute 2 TV PSA's to 100 stations in top 200 markets.

Achievements to Date:

Production completed. Date for distribution: Fall
Content taken from existing and current 5-part TV series.

4. Cable/ITV

GOAL: Distribute magazine-format to 300 cable TV stations across U.S. via satellite.

Achievement to date:

Production completed. Date for distribution: Fall
Content taken from existing and current 5-part TV series.



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- 4—Semolina and Flour Analysis
- 5—Micro-analysis for extraneous matter
- 6—Vitamins and Minerals Enrichment Assays
- 7—Pesticide plus Fungicide Analysis
- 8—Packaging and Adhesive Evaluations

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Durum Seeding Reduced; Marketable Supplies To Expand

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

Plantings of the Southwestern (California and Arizona) "desert Durum" were down 31 percent from 1982 and 62 percent from 1981. Over half of the acres put into conservation use were the result of producer participation in the whole-farm and 10 to 30 percent PIK program. Because of the PIK payment, a large share of carry-over stocks currently locked into the FOR will become available to the market. Heavy reserve loan activity during 1982/83 tightened free supplies and sparked a late-season price rally, but the forthcoming PIK transfer and the August harvest will more than double free Durum supplies for 1983/84. Correspondingly, this year's farm prices will likely duplicate last season's pattern and settle near the loan rate. However, this expectation is predicated upon continued favorable development of the 1983 crop and realization of the current 1983/84 Durum export forecast.

Semolina Prices Rise; Balances Are Low

Semolina prices in Minneapolis rose from \$12.50 in early July to almost \$14.00 by the end of August. At the end of August semolina prices were up 25¢ a cwt, but down about 25¢ from the peak. Even before the price advances were recorded, pasta manufacturers had experienced a much finer pricing policy on the part of semolina mills as a result of extremely disappointing milling margins in recent months. Thus, the turn to spectacular strength in cash durum served as second blow to users who had let balances dwindle lowest in many months.

Only a few pasta manufacturers have long-term needs of semolina on mills' books. Many have been following a week-to-week policy.

Hot and dry weather in North Dakota speeded the durum crop to maturity and good start was made in combining, well ahead of a year ago and the average. Initial cuttings revealed some evidence of stress from heat and dryness during the maturing period, but it was too early for any clear quality evaluations.

August, 1983 durum estimate 80,-957,000 bushel, 1982, 147,503,000; 1981, 185,940,000, 1980, 108,395,000.

In Canada

The Canadian wheat crop was in good condition as it progressed from heading to the filling stage. Good moisture and growing conditions have set the stage for high yields and possible record production. This year total Canadian wheat acreage is up 9% to 33.8 million acres. Total wheat production in Canada is projected at 990 million bushel as compared to 978 million bushel last year. Durum production is expected to be 105-110 million bushel compared to 116.5 million bushel in 1982.

Arizona Sells to Saudi Arabia

Arizona wheat growers have sent the second half of a 125,000-bu shipment of durum wheat seed to the government of Saudi Arabia for planting in that country. The seed is the first shipment of its size from Arizona.

The seed, sold to Saudi Arabia through the Arizona Crop Improvement Association, will be planted by growers under contract with the Saudi Arabia government, according to Robert Gronowski, a supervisor in the compliance division of the Arizona Agriculture and Horticulture Department.

Mr. Gronowski said the second half of the shipment was made after Arizona officials assured Saudi Arabian authorities that the seed was inspected during the growing season and that it was free from certain diseases, including bunt.

The seed shipped to Saudi Arabia, Mr. Gronowski said, is Yecora Roja variety and was harvested from 17,408 acres.

Mr. Gronowski said certifying that the Arizona seed is disease-free suggests that most Saudi Arabian seed purchases in the future will be from one or more states in the Southwest, including Arizona, California and Texas.

U.S. Wheat Associates

Milo Schanzenbach, a South Dakota wheat farmer, was elected chairman of the board of U.S. Wheat Associates Inc. at its annual meeting in Coeur d'Alene Aug. 2. Mr. Schanzenbach succeeds Darrell Ridley of Colorado as chairman. James Jenks of Montana was elected vice-chairman and Adrienne Polansky of Kansas was elected secretary-treasurer.

Mr. Schanzenbach, the new chairman, is also chairman of the South Dakota Wheat Commission, a member of South Dakota Wheat Producers Association and the National Association of Wheat Growers. He and his wife Ginger, live in Selby, S.D., and has three sons and a daughter.

Mr. Jenks, the newly-elected vice chairman, farms at Hogeland, Mont. and represents the Montana Wheat Research and Marketing Committee of the U.S. Wheat board. He is a member of the Montana Grain Growers Association, the Advisory Council on Agricultural Land Evaluation for Montana, and the advisory committee for the state extension service.

Mr. Polansky, the new secretary-treasurer, is from Belleville, Kan. He represents the Kansas Wheat Commission on the U.S. Wheat board. Mr. Polansky is chairman of the Agriculture Council of America and man of Kansas Governor John Carls' Agriculture Working Group. He is a member of the Kansas Association of Wheat Growers, National Association of Wheat Growers, Kansas Farmers Union, Grain Sorghum Producers Association, and the Kansas Crop Improvement Association. He is on the board of directors of the Kansas Crops and Soils Industry Council.

Directors of U.S. Wheat, in addition to the newly-elected officers, are: Colorado—Wayne Foster, Fred Midcap, Harrell Ridley, Lynn Taylor, Idaho—Bob Geddes, Frank Higgins, Jim McDonald, Myron Sorenson; Kansas—Robert W. Anderson.

(Continued from page 36)

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*Over 35 years of worldwide experience

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- Sanitary construction—all crevice free interiors and FDA approved epoxy coatings inside and out.
- Regrind systems—complete storage, grinding and feeding systems for regrind.
- Experienced engineering staff. If you are building a new plant or modernizing an existing one, put our staff of experts to work for you.



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PROFITS THROUGH SERVICE

by Arthur H. Klawans, Vice President of Industry Affairs
National Food Distributors Association at the Vinegar Institute



Arthur H. Klawans

Thank you for inviting me to talk with you about food distribution. I represent the National Food Distributors Association, a group of over 600 members. About half of our members are independent direct store food distributors and the other half are manufacturers, importers and suppliers of food products like yourselves.

The food distributor represents a unique segment of the American food distribution network. We know that over 70% of all the freight moved in the United States is food or food related products.

U.S. Wheat Associates

(Continued from page 34)

Vernon V. Schraeder, Donald H. Turnquist;

Minnesota—Harry Howard, Jerry Kruger, Ed Ross, Kermit Stahn;

Montana—Glenn Moore, Dale Schneider, George Skarda;

Nebraska—Verda Fentiman, Ervain Friehe, Vic Hass, John L. Sullivan;

North Dakota—George Howe, Henry Neshem, J. Ole Sampson, Cecil Watson;

Oklahoma—Walter Adams, Jack Hesser, Bill Kosanke, Jack McKee;

Oregon—John Cuthbert, William L. Hulse, Bill Jaeger, Tad Miller;

South Dakota—Art Kirkeland, Leon Haskins, Stanley Porch;

Texas—W. R. Moore, Jr.;

Washington—Dale Galbreath, Wayne Klindworth, Bob Schwerin, Monte Shaffer;

Wyoming—Dennis Jensen, R. J. Werner.

We know that there are 150,000 outlets for food and drink in the United States from the so-called "Mom and Pop" corner store or tavern to the 100,000 square foot "warehouse supermarkets". The majority of the high volume grocery tonnage that is moved to the retail store goes through the chain retailers warehouse or the independent retailers wholesaler warehouse.

But what about the 25% of the grocery product that is not considered "tonnage"? Most retail and wholesale warehouses reject these items that don't move in "mega" quantities. The typical 30,000 to 40,000 square foot supermarket (retail or independent) has 20,000 different stock items on its shelves. The typical retail warehouse or wholesaler warehouse servicing these stores may have 10,000 items in stock.

Where, then do all of the other items come from? The direct store distributor. They supply the soda, the milk, the bread, the slow-moving items, the ethnic foods, the specialty foods such as mustard, pickles, cocktail mix, cake decorations, spices, gourmet foods, cooking wines, vinegars, honey, table wines, dressings, sauces, dried fruits. These come from the distributor for several reasons which we will pursue in a few moments.

The refrigerated items such as cheese, deli meats, yeast, muffins, salads, and even fresh flowers, are delivered by the distributor due to perishability, movement, and special handling requirements.

The snack items such as cookies, crackers, pretzels, chips, popcorn and hard breads come through distributors due to their fragility, freshness requirements and special handling needs.

Dietetic foods come through distributors.

So we can see that in order for a full line supermarket to offer all of the items that its customers require, the distributor becomes the supplemental source.

Here is what happened, as best as we can piece together historically, in the evolution of the need for full serv-

ice direct store distributor needs of the food industry.

In the affluent years after World War II, consumers developed tastes for gourmet and specialty foods.

Then an ethnic migration took place within the United States requiring that certain stores and groups of stores have these types of items available. Large chains were faced with needing certain items in certain stores, but not in chain wide distribution.

Then the big manufacturers, the Campbell's Soups, the Beatrices, the Krafts, the Proctor & Gambles, found that the large grocery distribution organizations were literally cutting out their slower moving items from their warehouses. These manufacturing and merchandising giants made their items available to direct food distributors and the retail operators were happy to have the slower moving product line extensions on their shelves. These included some old staple items that will last for another generation.

One of the greatest success stories in the food distribution history is water. Right! Water. It seems that about ten years ago somebody got the idea that the pure spring imported bottled water was needed in the United States. But no one believed them, so the Perrier group enlisted some direct store delivery distributors to carry the item. And then the jogging craze hit and the dieters and the "me" generation wanted to live forever... and Perrier became a big, hot "tonnage" item.

The distributor, then, handles market introduction products of large and small manufacturers alike.

What's Coming Next?

- Natural and health foods will grow and grow.
- Prepared foods consumption will increase as the two pack households have more money and less time to spend on food.
- Low sodium and low sugar foods will be big, at least for a while.
- Single portion items for senior citizens and single households will become important in certain markets.

(Continued on page 38)

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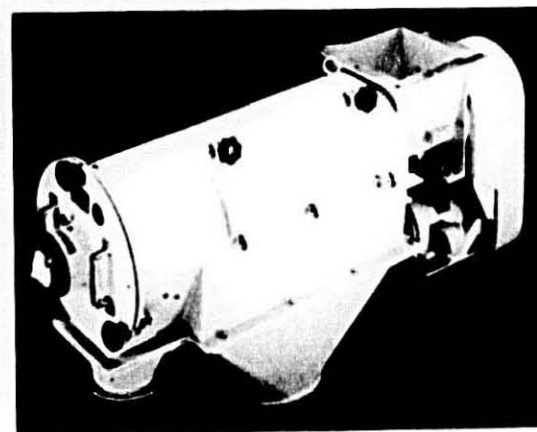
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Profits Through Service

(Continued from page 36)

- And who knows what else will move through distributors.

We have pursued the retailer's need for the direct store delivery distributor. Now let us consider what service then, the direct store distributor provides to manufacturers, such as the members of The Vinegar Institutes. Remember you are potential vendors to the retailer.

First of all, the direct store distributor is already delivering to those 150,000 retail outlets for your finished products. They are going there now. They have the buyer's confidence and the authorized list of products for the store and know how to get new items authorized for delivery.

Secondly, the profits from direct store delivery items that the retail outlets sell are much greater than those going through their systems. DSD accounts for 25% of the retail sales but 33% of the profits. The retailer likes numbers like that.

- The distributor is able to buy these specialty items at a lower cost than the retailer since he handles greater volume than the individual outlet.
- The distributor system bypasses the retailers costly labor in warehousing, trucking and the retail clerk level.
- The distributor services the old, damaged and unsellable products and usually provides full credit . . . thus reducing the shrink and loss in store throwaways.
- Finally, as a trained specialist by you, the manufacturer, the distributor provides promotional expertise and programs to increase sales of the specialty items. He will even provide a partial case if that is what is needed. These items move out at a higher gross profit than normal supermarket grocery items for the previously mentioned reasons.

The distributor makes this profit potential known to the retailer. Further, he provides the retailer with analytic "results" oriented data that proves, in fact, that 25% of the sales (distributor serviced) are providing 33% of the gross profit.

What Is Available for the Producer?

The food distributor and the distributor organization stand ready to serve you with the following:

- over 6 million square feet of warehouse space.
- warehouses in 41 of the 48 contiguous United States.
- over 300 warehouse locations.
- over 3,000 delivery vehicles.
- over 1,600 sales people on the street.
- over 2,300 store merchandisers/delivery people.
- over one-third of our members are in foodservice and institutional business also.
- they provide the manufacturer with movement and profit reports by item by store.

Let's take a quick review of how the direct store distributor serves the manufacturer and the retailer:

1. He provides warehouse facilities relieving both the manufacturer and the retailer from that cost.
2. He provides competent salesmen relieving the manufacturer of that cost.
3. He owns and operates his own fleet of trucks.
4. The distributor has trained delivery/people/merchandisers.
5. He has knowledge of the markets.

What Other Vital Functions Does the Distributor Provide?

1. Improves quality, freshness, service, variety to the point of sale.
2. Reduces inventories and inventory investment for manufacturers and retailers.
3. Reduces the retailer's need for \$10 per hour clerks in the store.
4. The distributor improves sales and profits for the manufacturer by assuring that ALL items in his line are featured, not just the fast movers.
5. The distributor, having been trained by the manufacturer, will build special displays and promotional attractions to assure that your product will move yielding greater sales and profits to all.
6. The direct store distributor has been trained and is organized in modern distribution and control methods.
7. In many instances, the distributor guarantees sales of your product.
8. Finally, the distributor will feed back results to you, the manufacturer, and to the retailer. He

will advise you of your sale and profit activities.

Doesn't the use of an applicable portion of this overwhelming food distribution service, the direct store distributor, appear better and more economical than what you're doing now? Give our members a chance to provide you with Profits Through Service.

Can You Afford Not To?

Thrifty Food Plan

Secretary of Agriculture John R. Block has announced a number of proposed changes in the so-called "thrifty food plan," increasing the emphasis on grain-based foods, but actually reducing recommended consumption of bread and other baked goods. The thrifty food plan is the basis for determining food stamp allotments to needy people, and Secretary Block said the revisions will "result in people getting more nutritious meals at low cost."

The thrifty plan is the least costly of four food plans developed in 1975 by the Human Nutrition Information Service of the Department of Agriculture. Food in the plan, reflecting the eating habits of families with relatively low food costs, "allows for a nutritious and economical diet," the Department said.

Secretary Block observed, "We are revising the food plan because of updated information on food price-food consumption, the nutritive value of foods and human nutritional requirements that have become available." The thrifty food plan was developed.

Among the changes proposed in the thrifty food plan for weekly consumption by a four-person family are the following:

Cereal and flour products (including rice and raw pasta)—Up 9.3 lbs weekly from 7.3 lbs previously. Bread—Down to 5.5 lbs per week against 6.9 lbs previously. Other baked foods—Down to 2.5 lbs per week, against 3.9 lbs previously.

Total for all grain food products—Off to 17.3 lbs in the proposed plan against 18.1 lbs currently in effect.

In summarizing the proposed plan, the Agriculture Department said it contains larger quantities of meat, dry beans, vegetables, fruit, cereal and flour for many age groups than are called for in the 1975 thrifty food plan.



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Correction

The July issue incorrectly stated that according to the World Food Report Birkel of Stuttgart, Germany has Drei Glocken as its principal brand. Birkel's brand is the Birkel name. Drei Glocken is the brand of the firm Drei Glocken.

—GMBH, Weinheim, Germany.

NRA Advocates Broader Concern for Nutrition

The National Restaurant Association (NRA) is urging its members to take into account the rising concern among some Americans about the relationship between diet and health. It urges restaurateurs to adjust menu offerings to appeal to their nutrition-conscious consumers.

An article appearing in the August issue of the association's magazine, *NRA News*, alludes to a consensus arising among consumers concerning a healthy diet. It advises restaurateurs to broaden their offerings of items which reflect this consensus.

"Since the government's 'Guidelines for Nutrition' appeared six years ago, specific recommendations have been widely publicized in the media and in schools. Among these are reducing animal fat, salt and sugar consumption and increasing fiber consumption," the article points out.

The article suggests that restaurateurs can help consumers follow these recommendations by offering "seafood and poultry; whole grain baked products; vegetables seasoned with herbs; sauces based on stock reductions and less butter, lard, salt and sugar in recipes."

The article also recommends some use of "minimalist" methods of food preparation including steaming, quick sauteeing and grilling rather than frying.

"We don't believe in telling people what to order in restaurants," said NRA Executive Vice President Robert Neville. "Consumers have the right to choose.

"Some prefer traditional food or regard dining out as a holiday from a strict diet. These guests should find the type of items they want on a menu. But people who wish to follow principles like those laid out in the guidelines should also have several items to choose from," said Neville.

"The industry—both the tableservice and fast food segments—have already made great strides in this direction," the NRA executive said. "We want to encourage this trend."

Recommendations

NRA recommends the following procedures to restaurants concerned with satisfying nutrition-conscious consumers.

- When possible, prepare food that is relatively low in sugar, sodium, fat and cholesterol, as recommended in *Nutrition and Your Health: Dietary Guidelines from Americans* (available from the Government Printing Office).
- Train staff to help customers select food adapted to their tastes and dietary needs.
- Offer wholewheat bread as an alternative to white bread.
- Broil or poach some meat and fish offerings.
- Give customers the option of a caffeine-free soda or low-fat milk.
- Offer fresh fruit as a dessert.
- When serving a baked potato,

offer condiments such as sou cream and bacon on the side. Do the same with salad dressings.

- To preserve nutrients in vegetables, steam them or broil until just done.
- Try thickening a sauce with arrowroot or low-fat cheese rather than butter, flour or cream.

NRA is a full-service trade association for the foodservice industry with 10 thousand members representing 10 thousand foodservice outlets. It offers its membership programs in education, research and public affairs.

Vital Information

Since 1975 the firm of Ernst & Whinney has conducted a Sales Index Study for the National Pasta Association. The contract with them expired at the end of June.

The responsibility has now been taken over by Robert M. Green of the Macaroni Journal.

Response to Ernst & Whinney is completely confidential and it will be kept that way. All information will be held in strict confidence and issued in summary form only. Monthly reports will go only to those firms which provide information.

Each participant in the program will be assigned a reporting code number so that no company name need appear on any report and all individual company data will be destroyed once it has served its purpose.

We believe pasta manufacturers who participate in this study will significantly improve management information.

First forms asked for product and sales for the first half of 1982 and sales for the first half of 1983 in the following categories:
Sales to the grocery trade;
Sales to foodservice;
Sales to industrial users;
Sales to government.
Data and reports will be on a monthly basis.

If you will participate send me name, address and phone number of the individual in your company who will supply the monthly information. Should there be any questions regarding the nature or conduct of the statistical program, please call Robert M. Green at 312-358-1022.

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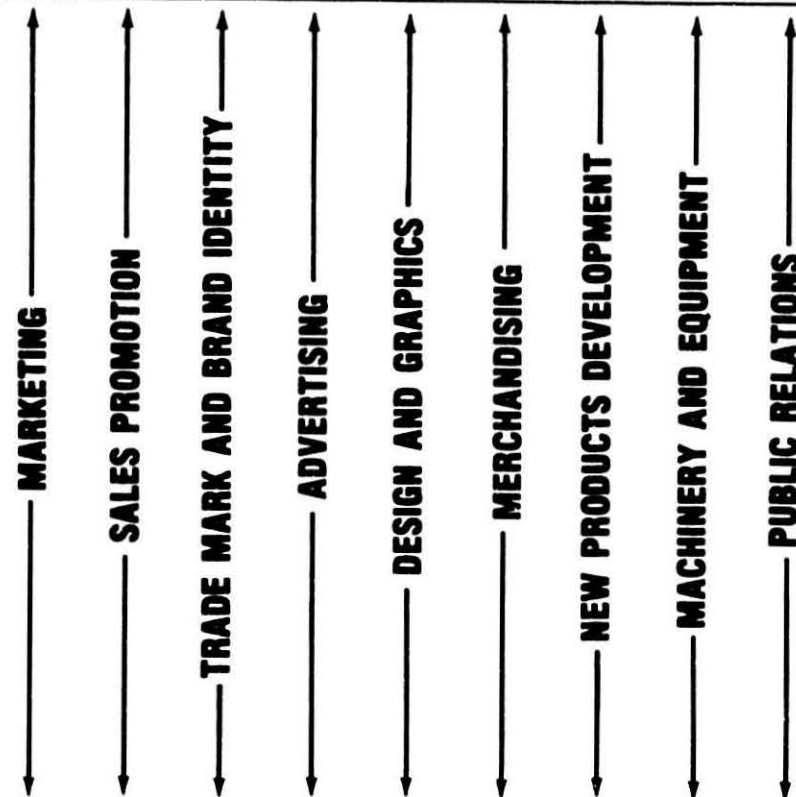
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