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In This Issue:

The Editor Takes a Trip

Last summer at the annual meeting of the National Pasta Association the Board of Directors and the membership gave us a gift of a trip to Europe. Fran and I are taking this tour in April flying from Chicago to Lisbon, traveling by rail through Spain, southern France, northern Italy, Austria, Germany, Switzerland, up to Paris and London. We will probably be back by the time you read this.

There will be pasta contacts along the way and we hope to bring some interesting articles back for the Macaroni Journal.

It was fortunate that one of the presentations at the N.P.A. Winter Meeting was that of Charles B. Riter of Riter Marketing Research, Baltimore: "Consumer Attitudes Toward Pasta — Results of a National Study." It is a goldmine of material to promote pasta and increase sales. We are printing it in its entirety.

More reports from the Winter Meeting will appear in the June issue and the July number will have material from the Plant Operations Seminar in Cambridge, Massachusetts.

Milling & Baking News called for reason on the EDB situation in a recent editorial and Pillsbury has an update in booklet form that was distributed at a press conference held by the Grocery Manufacturers Association in early March. This is covered in material starting on page 28.

Light-Recipe Frozen Entrees

On-Cor Frozen Foods, Inc. has introduced a line of 2 lb. frozen light calorie entrees called "On-Cor Lite."™ Initially line consists of 4 entree varieties — Vegetable Lasagna Alfredo, Vegetable Manicotti Marinara, Beef Oriental, and Vegetables Primavera with Chicken. The 4 dishes range from 180-230 calories/8 oz. serving and are recommended as light meal entrees for a family of 4, or for use as a side dish in a full course meal.

Says company President Sol Friend: "We know we've got a winner. We've taken popular family meals and updated them with lighter recipes. But we're still using fresh-cooked vegetables, pasta cooked al dente, and other high-quality ingredients, so they retain traditional flavors and textures."

Consumer Attitudes Toward Pasta

Results of a National Study

by Charles B. Riter, Riter Marketing Research, Baltimore, MD

At the N.P.A. Winter Meeting

American's habits as they relate to eating, shopping and dieting are changing. More importantly, the American consumer has serious misconceptions about wheat-based foods, and in particular pasta products.

Here are the results of our 12 month study of food, nutrition and dieting. The findings that we're about to discuss were compiled from 3,366 respondents . . . balanced in terms of age and sex characteristics and can be considered representative of most U.S. households.

We believe it is the most comprehensive study of American attitudes, habits, perceptions and myths that has been done in recent times. The study was funded by a grant from Universal Foods, and was designed and conducted by my company, Riter Marketing Research of Maryland, in conjunction with Market Facts of Chicago.

The recently completed baseline study on "Food, Nutrition and Dieting" focused on the attitudes and behavior of your consumers towards pasta products. Before we discuss some of the highlights I'd like to discuss the objectives of this study, how it was developed and how the results can be effectively utilized by each of you.

The purpose was to provide the wheat-based food industry, and in particular pasta manufacturers and millers, with a base of information about how current and potential consumers perceive and use your products. The study explored the following:

- Eating and dieting habits;
- Attitudes and knowledge about nutrition; and
- Perceptions, misconceptions and usage of specific foods, specifically:
  - — dry spaghetti
  - — dry egg noodles
  - — dry macaroni
  - — tuna noodle casserole
  - — macaroni salad
  - — macaroni and cheese
  - — spaghetti with meat sauce
  - — fresh pasta.

The study was designed so that we could look at the results by specific key consumer groups; including

- Sex,
- Race,
- Regionality,
- Income,
- Dietary behavior,
- Concern with nutrition, and
- Exercise regimen.

And in particular, the study allows us to look at heavy, light and non-users of:

- Spaghetti;
- Egg Noodles; and
- Macaroni.

It further provides information on such issues as:

- Consumer perceptions and attitudes about spaghetti, macaroni and egg noodles, as well as and dishes such as tuna noodle casserole and spaghetti with meat sauce;
- Familiarity with fresh pasta;
- Exposure to the fresh pasta section of the grocery store; and
- Ownership of pasta machines.

How the Survey Can Be Used By You and by the Industry

With the results of this survey, you have available one of the most comprehensive studies ever conducted on the consumption of pasta products.

The opportunities for its benefit and use in your industry and individual companies are limitless. As an industry, you can use the results as the basis of marketing, advertising, promotional and nutritional education programs that are designed to increase the consumption of many of the pasta products. Of equal importance, this study can assist your efforts to address the various misconceptions consume[rs] have about your products. The resul[ts] indicate that consumers would like [to] eat more pasta than they do now, b[ut] common misconceptions about pas[ta] are limiting consumption.

Additionally, as independent pas[ta] manufacturers, you may use this info[r]mation to develop new products, t[o] identify new markets, and to prepa[re] new advertising appeals.

At this point let me review the hig[h]lights of the study as they relate to:

- Attitudes and knowledge abou[t] nutrition,
- Perceptions and misconception[s] toward selected pasta products,
- Usage of selected pasta product[s],
- Familiarity with fresh pasta, an[d]
- Ownership of pasta machines.

Now, let's begin with American atti[tu]des about nutrition . . .

Only one in five shoppers is ac[tively] interested in nutritional informa[tion] on food labels. In fact, more con[sumers] are concerned with the pric[e,] ingredients and dating than the nutri[tional] information on food labels.

Percent Who Pay Attention

Base: Total Sample	
Bakery Dating	52%
Unit Pricing*	35%
Ingredient Information	28%
Nutritional Information	20%

* Based on those exposed to unit prici[ng]

The average consumer consid[ers] himself well informed about nutrition and is becoming more concerned wit[h] nutritional labeling as he gets old[er.] Interestingly, adults without childre[n] show a greater concern about nutritio[n] information than those with children.

We also found that parents percei[ve] their teens as being almost as informe[d] about nutrition as they — the parent[s] — are. They also believe their teenagers, particularly boys, eat what the[y]

Consumer Attitudes

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want and are not concerned with nutrition. This is significant in light of all the nutritional education programs that have been targeted towards teenagers in recent years.

We found that consumers say they are more concerned than ever about nutrition . . yet they generally ignore nutrition information on labels and do not use this information as a basis for selecting one product over another. When consumers do read a food label, they look for infonnation about content — that is, the amount of sugar, calories, salt and additives rather than nutritional values.

One of the reasons why Americans ignore the nutrition information on labels may be because of the language that is used to present this information. You, as pasta manufacturers, understand such terms as "fiber", "minerals" and "carbohydrates". Yet, only one out of two consumers we surveyed say they are familiar with these terms and their meanings. The other half readily admit that they don't understand what the terms mean.

Another, more relevant example, the term "enriched flour" which co fronts consumers when they purcha many wheat-based foods, such as pas

When we asked consumers about t meaning, we learned that to many t term enriched flour conveys a divers of additives, most of which are perce ed as positive, although they have n been added.

This clearly illustrates the confusio and misconceptions which surrou many of the words used on food pac aging. It further explains why ov 90% of the population would pref the use of generic terms on food labe ing, and why so few consumers reg larly make use of nutritional labels o food products.

PROPORTION WHO PAY A LOT OF ATTENTION TO NUTRITIONAL FOOD INFORMATION

Total Sample	20%
Sex of Respondent Involved in Shopping	%
Women	23
Men	14
Age of Respondent	
Under 25	15
25 to 34	19
35 to 44	20
45 to 54	20
55 to 64	23
65 and over	25
Presence of Children	
Children in Household	18
No Children	22
Size of Household	
One	21
Two	21
Three to Four	19
Five and over	19
Race (Women)	
White	22
Non-White	26
Annual Household Income	
Under $10,000	19
$10,000 to $14,999	20
$15,000 to $19,999	17
$20,000 to $29,999	21
$30,000 and over	22
Geographic Region	
East	20
North	19
South	19
West	23

Q. 17 — Do you find that you pay a lot of attention, some attention, or no real attention to the nuritional labeling on foods?

FAMILIARITY WITH NUTRITIONAL AND INGREDIENT TERMS

Base: Total Sample (3366)

V.F. = % Very Familiar With Term/Meaning

N.F. = % Not Familiar With Term/Meaning

Word	V.F.	N.F.
Vitamins	79	1
Caffeine	78	1
Starch	66	1
Vegetable Shortening	65	2
Animal Fat	60	2
Meat Protein	58	3
Carbohydrates	55	3
Fiber	54	3
Minerals	53	3
Enriched Flour	53	2
Empty Calories	36	25
Vegetable Protein	35	10
Soy Protein	25	17
Nitrates/Nitrites	23	16
Amino Acids	22	20
Whey	21	19
Trace Minerals	19	30
Complex Carbohydrates	18	24
Nutrient Density	7	44

Table excludes no answer and respondents who claimed some familiarity with meaning.

Q. 15 — For each term please indicate how familiar you are with the term and its meaning.

FAMILIAR WITH GUIDELINES*

	Very	Somewhat	Ne
American Heart Association	24	43	67
American Cancer Society	23	42	65
Weight Watchers	21	40	61
Dept. of Agrciulture	14	41	55
U.S. Surgeon General	17	35	52
American Diabetic Assn.	12	21	33
Nutri-Systems	9	20	29
Cambridge Diet	8	20	28
Natl. Institute of Health	5	20	25
Scarsdale Diet	6	18	24
American Dietetic Assn.	6	13	19
National Academy of Science	4	10	14
Pritkin Diet	3	9	12
Diet Center	3	8	11

* Familiarity —with other programs all under 5%.

Q. 53 — How familiar are you with th guidelines published by each of the follo ing groups?

We also found that consumers, b and large, are not very familiar wit various guidelines concerning healt and nutrition. While many people hav heard of various programs, such a Weight Watchers, American Canc Society, American Heart Associatio U.S.D.A. and The U.S. Surgeon Ge eral, the vast majority don't kno what the guidelines really are. Th three programs that people knew th

Consumer Attitudes

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most about are the American Cancer Society, American Heart Association and Weight Watchers. And, only about one in four of the people questioned claimed they were familiar with these programs . . . and even fewer people have and follow their guidelines.

Concerning nutrition and dieting needs, we also found out that consumers feel they need to cut the following from their diet:

- — starch,
- — fat,
- — carbohydrates,
- — sugar,
- — calories,
- — caffeine, and
- — salt.

And, these products in particular they feel they should cut out: candy, snack cakes and white bread.

In contrast, consumers felt they should increase consumption of the following:

- — fiber,
- — bulk, and
- — vitamins/minerals.

Products they feel they should increase usage of are:

- — vegetables,
- — fresh fruit, and
- — wheat bread.

There *are* serious misconceptions about most foods. However, we would like to focus on the misconceptions shared by many Americans relating to selected pasta products.

The actual calorie content of pasta products is one of the most serious misconceptions. Despite a high level of interest in counting calories, most consumers overestimate calories in food products, sometimes by as much as six times the actual content. This table shows consumer estimates for various products, and while differences exist the overall conclusions are the same, consumers do not know the actual calorie levels of foods.

PERCEIVED CHANGES NEEDED IN OUR DIET

Need More		Need Less	
Fresh fruit	+56	Red meat	—11
Vegetables	+43	Potatoes	—15
Fiber	+43	Vegetable oil	—22
Vitamins/Minerals	+40	Macaroni	—26
Poultry	+24	Spaghetti	—26
Milk	+22	Vegetable shortening	—29
Vegetable protein	+21	White bread	—36
Bulk	+20	Carbohydrates	—38
Wheat bread	+20	Animal fat	—50
Trace minerals	+ 8	Starch	—56
Meat protein	+3	Caffeine	—62
Amino acids	+3	Calories	—65
Whey	+1	Candy	—69
Eggs	0	Salt	—69
Rice	0	Sugar	—72

Let's focus on pasta products. The perceived calorie level in a five ounce serving of macaroni with cheese is seen as 350 calories vs. the correct level of 269 . . . that's nearly 34% greater than what's true.

Similarly, five ounces of spaghetti with sauce is seen as containing nearly one-third the correct level — 300 calories vs. a reported 391.

This is especially important to you since calories are one of the things consumers are trying to cut back on, and consumers including current users perceive pasta products have more calories than they really do.

We asked consumers to identify the major ingredients of various pasta products. In terms of ingredients, spaghetti and macaroni are seen as essentially identical. Consumers accurately list the ingredients as flour, eggs and salt. However, it is also important to note that about one in four consumers see preservatives and additives as one of the major ingredients in pasta products . . . another misconception.

When we asked consumers what pasta products provided to the diet, the most frequent answer was starch. As we noted earlier, one out of two consumers feel they need to cut back on starch in their diet.

The other two ingredients which spaghetti, macaroni and egg noodles are seen as providing to diet are (a) carbohydrates and (b) salt.

CONSUMER PERCEPTIONS OF MAJOR INGREDIENTS IN SPECIFIC FOOD

Ingredients	Spaghetti (Dry Packaged)	Macaroni (Dry Packaged)	Egg Noodles (Dry Packaged)
Sugar	4	5	5
Yeast	7	8	[illegible]
Whey	9	9	7
Milk	10	10	13
Vitamins/Minerals	17	16	11
Shortening	26	26	21
Preservatives/Additives	26	25	21
Water	30	30	21
Salt	34	34	31
Eggs	40	41	[illegible]
Flour	79	79	[illegible]

Again, carbohydrates, starch, salt and sugar are what most consumers feel they need to reduce in their diet. Unfortunately, starch, carbohydrates and salt are the elements which consumers believe spaghetti and macaroni provides.

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Consumer Attitudes

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WHAT PASTA PROVIDES IN DIET PASTA GROUP

	Spaghetti			Macaroni			Egg Noodles		
Base	Sample Total	Frequently Serve	Not Served Recently	Total Sample	Frequently Serve	Not Served Recently	Total Sample	Frequently Serve	Not Serv Recent
	(3366)	---	(1350)	(3366)	(832)	(1307)	(3366)	(794)	(153[illegible])
Starch	79%	83%	76%	79%	84%	74%	77%	80%	75%
Carbohydrates	58	58	56	57	59	54	57	61	55
Salt	45	47	44	44	45	42	45	49	42
Vegetable shortening	33	29	34	34	34	32	36	38	34
Vitamins/minerals	32	38	29	31	35	25	35	39	31
Minerals	23	27	18	22	24	17	24	29	22
Vegetable protein	17	15	17	17	18	15	17	18	16
Fiber	14	17	14	14	17	13	14	17	15
Complex carbohydrates	13	17	11	13	14	11	12	11	11
Trace minerals	13	13	13	13	14	12	15	20	14
Empty calories	13	12	13	13	11	13	12	12	13
Sugar	12	12	12	12	12	12	12	13	12
Nitrates	10	7	12	10	10	10	10	12	9
Animal fat	7	8	7	7	8	6	8	10	8
Amino acids	5	7	5	5	5	4	7	8	6
Meat protein	3	3	2	3	3	3	5	5	5
Caffein	•	•	•	1	•	1	1	1	1

Q. 27 — For each product listed across the top below, please "X" all the things you feel that food provides in a person's diet — whether or not you, personally, eat it.

On the positive side, consumers see the price/value of your products very favorably. With the exception of the more natural products, pasta products are rated above many other products such as red meat, pizza and white bread.

PRICE/VALUE PERCEPTION TOTAL SAMPLE

	Excellent	Good	Total
Eggs	41	43	81
Milk	37	41	78
Potatoes	32	43	78
Fresh fruit	36	38	74
Rice	20	50	70
Wheat bread	18	46	64
Enriched flour	15	45	60
Packaged macaroni	13	46	59
Packaged spaghetti	12	46	58
Packaged egg noodles	9	44	53
Red meat	13	35	48
Saltine crackers	8	37	45
White bread	8	32	40
English muffins	3	23	26
Pizza	4	20	24
Packaged cookies	2	10	12
Packaged donuts	2	8	10
Snack cakes	1	6	7

An important part of the study measured people's opinions regarding different pasta products and certain other foods, such as fresh fruit, potatoes, bread, eggs, milk, chicken and ground beef. Including other foods provided a point of reference for assessing how people position wheat products relative to other, everyday food

The questioning technique consis of asking respondents to indic which of a number of statements, i their opinion, described each produc Some typical statements were: natura provides quick energy, good tasting fattening, etc. In total, 25 different p ducts were evaluated using a list 34 statements. Each product has score for each statement, enablin more than 1,000 comparisons. We a conducted a special statistical analy

We found consumers differentia the most between products in terms

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Just how much is a ppb? One ppb i equivalent to four drops of water in filled Olympic-sized pool (64,000 gal lons). Or, for those of you on a low carbohydrate diet, one ppb is on crouton in a salad weighing 500 tons. — Gordon W. Gribble, Dartmouth College.

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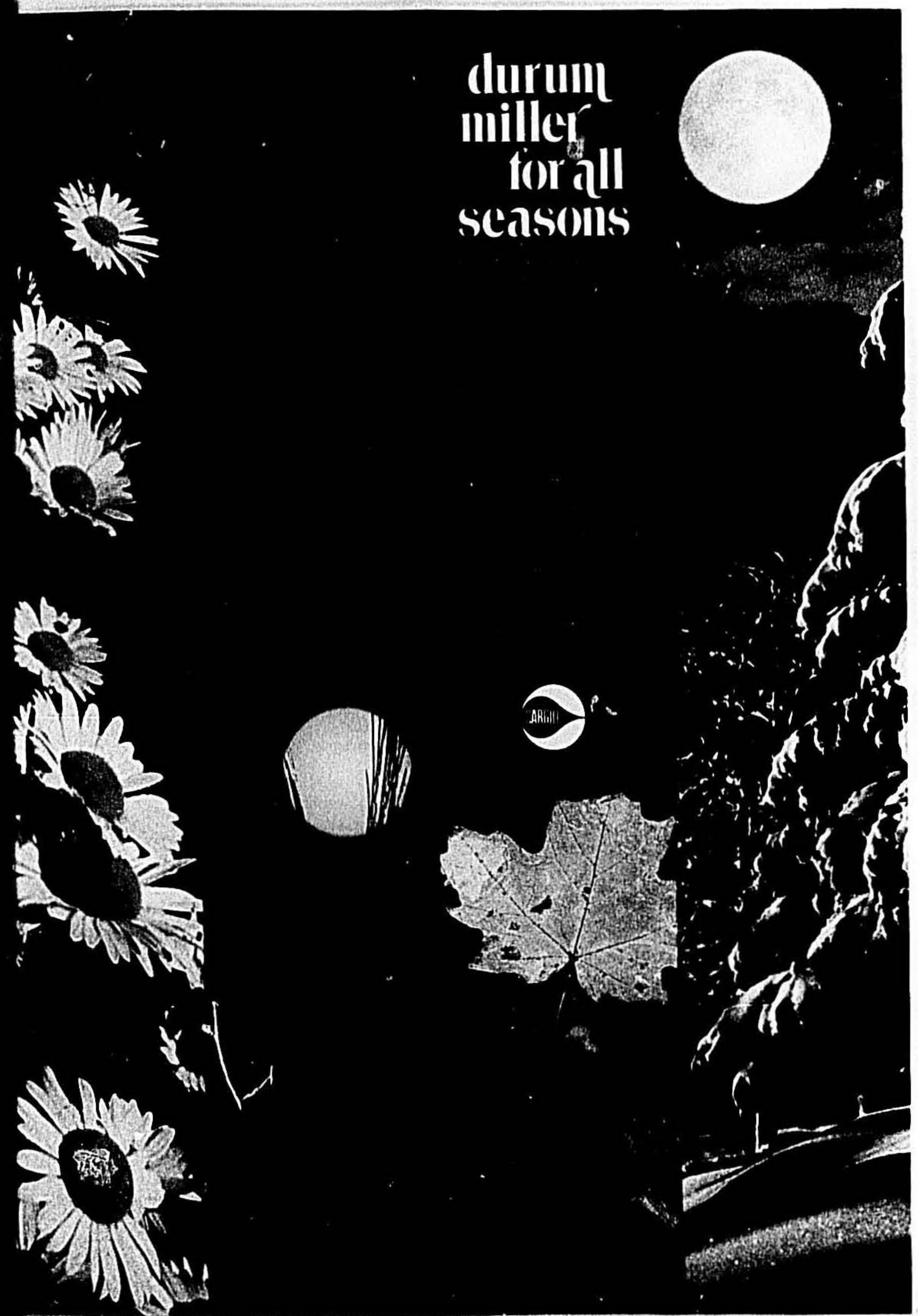

onsumer Attitudes

(Continued from page 10)

ing good or bad for you. Specifically, ods which are characterized as good bad have the following attributes ociated with them.

BAD

Fattening
Little nutritional value
High in calories
Junk food

GOOD

Part of a balanced diet
Nutritious
Wholesome
Good for growing children

As would be expected, the two attri- te groups are opposites of each other; ., are negatively correlated with each ner. For instance, if a food product ores high on the attributes in one oup, it will score low in the other oup.

Another combination of attributes which consumers differentiate be- een food products deals with starch ntent, and how filling the food is lieved to be.

High in starch
More filling

Low in starch
Less filling

Further more, consumers readily tinguish between their perceptions products that constitute "junk od" and those that do not.

Consumers generally feel very posi- e about wheat itself as a source of ighage and fiber and describe it as e of the "good for you" elements of od. But, when wheat is used as an redient in food products, consumer areness of the nutritional value of various products drops sharply.

For example, both spaghetti and caroni are primarily made with eat, yet they are seen as less whole- me and less natural than wheat itself.

Here are some of the highlights of w consumers see various pasta pro- cts.

- Spaghetti and macaroni have similar profiles in the minds of consumers. Both are associated with high starch content, being filling and fattening, and having low nutritional value. They also are seen as a good value for the money and products children especially enjoy eating.
- Egg noodles, however, are perceived as somewhat less fattening, less filling and somewhat nutritious — probably as the result of the addition of eggs. The latter also causes egg noodles to be rated somewhat higher in cholesterol than spaghetti or macaroni.

Combining other ingredients with the pasta product — such as spaghetti and meat sauce, macaroni and cheese, macaroni salad and tuna noodle casserole — tends to increase both positive and negative perceptions of the overall dish, specifically:

- Spaghetti with meat sauce and tuna noodle casserole are singled out for their higher protein content.
- Macaroni w/cheese is identified with a higher cholesterol level.
- As you might expect, the combination products — spaghetti w/ meat sauce, tuna noodle casserole and macaroni w/cheese are labeled "nutritious" more frequently than the plain products.

Now, let's focus on product usage and who consumes your products.

Using a four week period, nearly six out of ten consumers reported serving spaghetti, macaroni and egg noodles. And while consumers appear to have increased their use of food products having an aura of being good for you, such as wheat bread or chicken, and decreased purchasing products which may be characterized as fattening or bad for you, consumption of spaghetti and macaroni products has not changed substantially.

Multifoods Sets Dividends

Minneapolis, March 12. — International Multifoods Corp. declared regular quarterly dividend of 44¢ per share on the common stock, payable April 15 to shareholders of record on March 28. Multifoods also declared quarterly dividend on each series of the preferred stock.

INCIDENCE AND FREQUENCY PRODUCT USAGE

Product	Incidence Served In Past 4 Weeks	Net Difference* (Purchase More/Less)
Breads		
White bread	57%	— 4
Rye bread	28	—11
Wheat bread	46	+25
English muffins	34	— 5
Bagels	15	— 1
Rolls	51	—26
Hamburgers/ hot dog buns	51	—18
Meat		
Pork/ham	68	—14
Red meat (except ground beef)	66	—17
Ground beef	82	+13
Poultry		
Chicken	84	+33
Turkey	45	— 1
Fish		
Fish (except shellfish/ seafood)	66	+ 9
Shellfish/seafood	35	—11
Pasta		
Spaghetti	58	— 1
Macaroni	59	— 2
Egg noodles	48	—11
Fruit		
Fresh fruit	73	+44
Canned fruit	55	— 5
Sweet Goods/ Snacks		
Packaged cookies	55	—12
Cake	42	—39
Packaged snack cakes	30	—19
Donuts	40	—32
Pie	29	—46
Crackers (except Saltines)	55	— 6
Saltine crackers	56	— 2
Pastries and sweet rolls	42	—41
Individual fruit pies	20	—40
Vegetables		
Potatoes	83	+ 1
Fresh vegetables (except potatoes)	76	+24
Canned vegetables	68	— 9
Frozen vegetables	74	+ 9

Consumer Attitudes

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Although the pasta products are seen as quite similar in terms of calorie levels, ingredients and nutritional value they are served quite differently:

- Macaroni is used primarily as an ingredient for casseroles and is served both hot and cold as a main dish or side dish.
- Spaghetti is primarily served hot as a main dish and is not seen in versatile as macaroni.
- Egg noodles are primarily used as an ingredient in casseroles and soups. Other uses are limited.

Analyzing the actual consumer of various products reveals that the presence of children has a strong relationship on adult consumption for spaghetti and macaroni.

- Spaghetti and macaroni show nearly identical user patterns in terms of family size, age and region.
- Adults from larger households are more likely to consume spaghetti and macaroni.
- Consumption of spaghetti and macaroni drops with age.
- Consumption is greatest in ... East and lowest in the West.
- Nutritional concerns and inco... do not seriously affect adult co... sumption.

Consumers were asked if the st... where they did most of their groce... shopping had a fresh pasta sec... Overall, few consumers (7%) are ...

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WAYS SPECIFIC PASTA PRODUCTS ARE SERVED AMONG REGULAR USERS OF PRODUCT

	Spaghetti	Macaroni	Egg Noodle[s]
Hot, with sauce	89	59	49
As a main course	86	50	35
Instead of potatoes	43	63	62
Instead of rice	35	53	55
As an ingredient in casseroles	33	71	74
As a side dish	25	58	55
As an ingredient in soup	20	48	68
Hot, without sauce	17	21	35
Cold, as a salad	6	67	10

Selected Pasta Products
Proportion Who Agree With Statement

	Spaghetti			Macaroni			Egg Noodles		
	Total Sample	Serve Frequently	Not Served Recently	Total Sample	Serve Frequently	Not Served Recently	Total Sample	Serve Frequently	Not Served Recently
Fattening	55%	58%	53%	55%	56%	54%	43%	44%	41%
Part of a well-balanced diet	29	37	24	30	34	26	33	42	28
Low in cholesterol	17	20	14	18	20	14	13	12	13
Good food value for the money	51	56	47	54	56	51	43	51	36
Good for growing children	30	36	27	29	33	25	35	42	28
Low in carbohydrates	4	6	4	4	6	4	6	6	6
Provides roughage and fiber	13	18	11	12	14	11	11	11	10
High in starch	74	77	71	75	75	73	69	70	66
Good tasting	54	60	47	52	57	46	53	59	46
High in calories	47	47	46	46	45	47	41	44	38
Few preservatives/additives	21	21	19	21	20	19	21	22	18
Liked especially by adults	43	49	39	37	41	32	42	46	38
High in carbohydrates	47	50	45	48	48	45	43	46	40
Not much food value	18	16	18	18	17	20	13	11	13
Good source of vitamins & minerals	17	18	16	16	18	12	24	27	21
Good source of protein	16	29	16	15	17	14	20	23	19
Little nutritional value	19	15	21	20	19	22	15	13	16
High in cholesterol	9	11	9	9	11	8	24	27	23
High in sugar	2	2	2	2	3	2	2	3	2
I enjoy eating frequently	36	47	30	33	42	24	32	42	23
Bad for you	5	5	5	5	5	6	3	2	3
Liked especially by children	53	53	53	50	50	46	31	37	26
Filling	71	70	70	72	71	60	59	66	53
Low in fiber	26	19	28	28	24	29	29	30	28
High in salt content	15	16	14	14	15	12	15	15	15
Junk food	2	3	3	3	2	4	2	2	2
High in fat	10	11	10	9	10	10	11	11	11
Expensive	3	4	4	3	3	4	6	6	6
Natural	10	10	9	10	11	9	15	16	13
Wholesome	26	23	26	28	28	26	32	37	28
Product I trust	36	37	34	37	39	34	32	39	24
Provides quick energy	14	12	14	13	11	14	11	14	9
Fresh	5	6	6	6	7	6	10	11	8
Nutritious	35	30	35	36	36	32	42	48	36

Q. 29 - For each product listed across the top below, please "X" the statements which, in your opinion, describe that product. First, "X" the statements for "Macaroni (Dry Packaged)." Then, go to "Potatoes," and so on.

Consumer Attitudes

(Continued from page 14)

posed to fresh pasta sections where they shop. Regionally, fresh pasta sections are most prevalent in the east (12%) and in the central city (9%).

DOES USUAL GROCERY STORE WHERE SHOP HAVE FRESH PASTA SECTION

Total Sample	7%
Geographic Region	
East	2
North	4
South	7
West	7
Population Density	
Central City	9
Urban	6
Rural	7

Purchase of fresh pasta, where available, indicates that trial and frequency of purchase is significant. Specifically:

- 32% purchase fresh pasta from their supermarket at least once a month or more and another 15% buy it less frequently.
- 49% have not purchased fresh pasta from their supermarket, where available.

Ownership Of Pasta-Making Machine

The study also found that few (2%) consumers own a pasta-making machine. Among those few consumers who own a fresh pasta machine, usage is quite limited. Predictably for a highly specialized kitchen appliance, ownership increases with income.

Typically, among owners 60% use the machines less than once a month; only 12% report using the equipme at least every two weeks.

OWN PASTA-MAKING MACHINE

Total Sample	2%
Income	
Under $10,000	*
$10,000-$14,999	1
$15,000-$19,999	4
$20,000-$29,999	3
$30,000 or more	5
Region	
East	3
North	3
South	2
West	3

* Less than 1%.

To summarize, we found th American habits about shopping, ea ng, dieting, and lifestyles are changing. Americans have serious misconceptions bout most foods, and this includes pasta. Pasta's role in the diet is undervalued and misunderstood. What does his mean? It means that the National Pasta Association must educate the onsumer about pasta's attributes, with he major thrust that pasta is not fatening and is good for you. It means hat pasta manufacturers must tell onsumers pasta is made from wheat nd that independent authorities such s the American Heart Association advocate the increased consumption of that product high in carbohydrates, such as pasta. It means telling consumers that spaghetti with sauce is not 400 calories but under 300 calories.

It means looking at how we use our labels to communicate the nutritional value of pasta in language the consumer can understand.

It also means looking at consumer perceptions regarding various foods and promoting your products accordingly. For example, promoting pasta dishes using fish and poultry, and not meats and cheeses. It means looking at today's lifestyles. For example, you need to look at the empty nesters *and* singles and to develop recipes and products that meet their changing lifestyles.

Pasta's role in the diet is undervalued and misunderstood. You, as an organization, must convince consumers of pasta's nutritional value and place in our diets. You must quite simply give consumers permission to make pasta part of their diets. And finally, you need to track your efforts so you can see how well your new efforts are succeeding. Finally, you need to keep monitoring so you can perceive and evaluate changes in attitudes and lifestyles and adjust marketing programs accordingly.

(Continued on page 20)

Product Profile
Spaghetti, Macaroni, Noodles
Proportion Who Agree With Statement

	Spaghetti (Dry Packaged)	Macaroni (Dry Packaged)	Fresh Pasta	Egg Noodles	Spaghetti* with Meat Sauce	Macaroni* And Cheese	Macaroni* Salad	Tuna* Noodle Casserole
Fattening	55%	55%	60%	43%	63%	61%	50%	37%
Filling	71	72	65	59	81	77	64	74
High in starch	74	75	69	69	72	76	68	59
High in calories	47	46	52	41	63	63	51	45
High in carbohydrates	47	48	44	43	47	49	45	40
High in salt	15	14	18	15	32	27	20	30
High in sugar	2	2	5	2	7	4	6	4
Bad for you	5	5	7	3	5	5	5	4
High in fat	10	9	16	11	26	24	17	12
High in cholesterol	9	9	17	24	24	30	17	15
Junk food	2	3	7	2	2	3	4	2
Low in nutrition	19	20	16	15	5	5	16	5
Little food value	18	18	15	13	5	6	16	5
Low in fiber	26	28	26	29	29	32	32	31
Fresh	5	6	36	10	20	20	26	19
Part of a well balanced diet	29	30	23	33	48	52	37	55
Nutritious	35	36	35	42	62	62	47	65
Good for growing children	30	29	24	35	53	57	34	53
Wholesome	26	28	29	32	43	43	33	46
Good source of vitamins and minerals	17	16	20	24	40	39	32	46
Provides roughage and fiber	13	12	12	11	15	13	17	14
Good source of protein	16	15	14	20	52	53	23	60
Provides quick energy	14	13	16	11	25	25	17	22
Few preservatives/additives	21	21	32	21	26	26	25	27
Natural	10	10	24	15	18	21	16	18
Low in carbohydrates	4	4	4	6	6	4	6	10
Product/trust	36	37	23	32	43	46	32	37
Low in cholesterol	17	18	13	13	11	8	14	20
Good food value for the money	51	54	28	43	63	67	47	64
Expensive	3	3	20	6	11	6	7	14
Good tasting	54	52	54	53	80	76	66	66
I enjoy eating frequently	36	33	30	32	62	53	36	36
Liked especially by adults	43	37	51	42	68	55	55	56
Liked especially by children	53	50	31	31	72	68	23	30

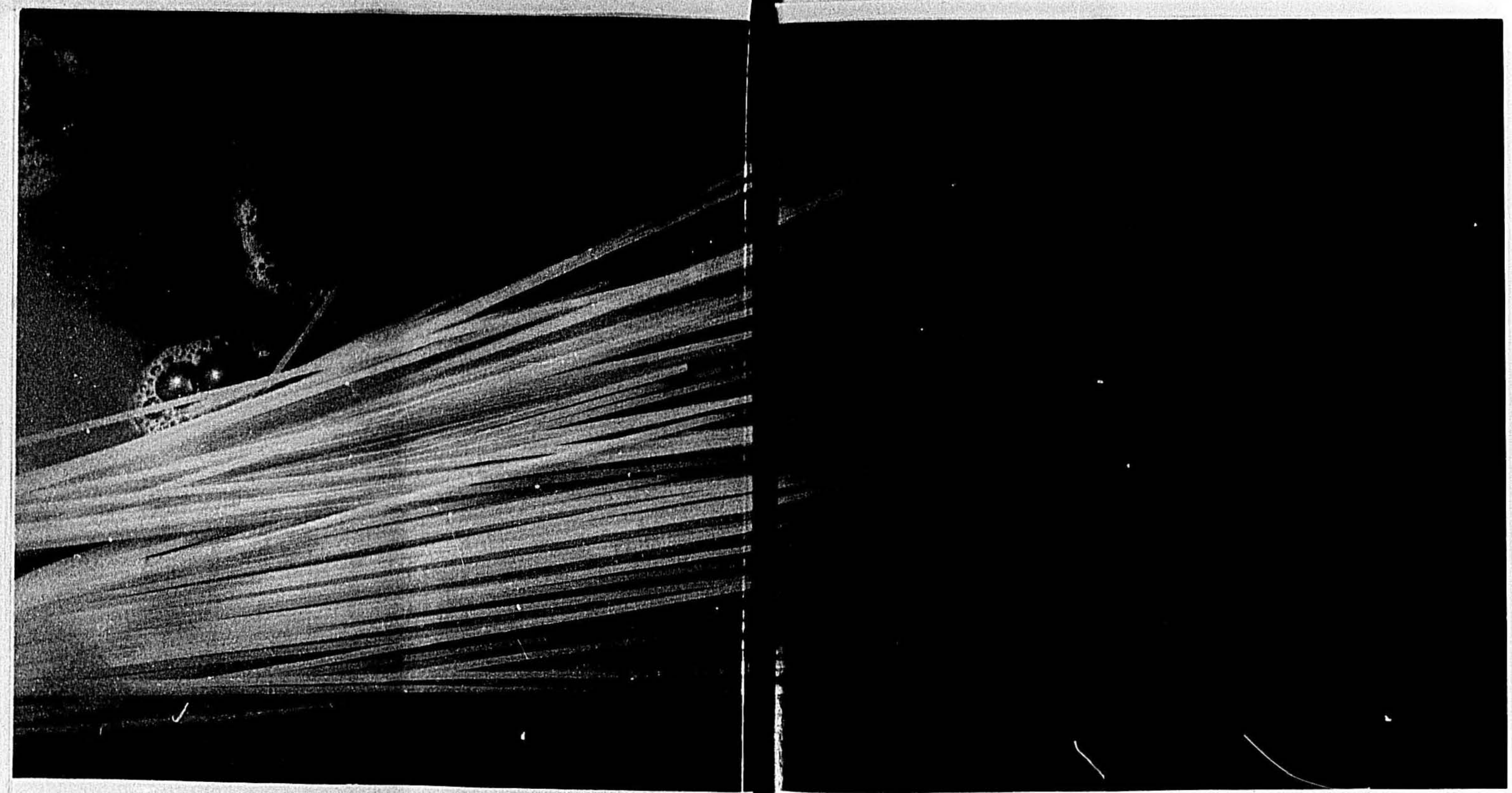
Q. 29 - For each product listed across the top below, please "X" the statements which, in your opinion, describe that product. First, "X" the statements for "Macaroni (Dry Packaged)." Then, go to "Potatoes," and so on.

*Q. 31a - For each dish listed across the top below, please "X" the statements which, in your opinion, describe that dish.

Miscellaneous
Product Profiles
Proportion Of Sample Who Agree With Statement

	Whole Milk	Fresh Fruits	Eggs	Ground Beef	Chicken	Baked Potatoes	Pizza	Saltine Crackers
Fattening	38%	2%	5%	17%	4%	32%	67%	27%
Filling	38	33	30	51	45	73	66	26
High in starch	2	3	3	2	1	69	51	50
High in calories	34	4	8	25	5	26	65	24
High in carbohydrates	11	10	8	7	3	39	40	31
High in salt	2	*	1	4	2	2	36	73
High in sugar	2	13	*	1	1	1	5	3
Bad for you	4	1	4	3	1	2	11	7
High in fat	35	*	9	46	12	5	31	6
High in cholesterol	22	1	73	27	6	5	22	6
Junk food	1	*	1	2	1	1	32	8
Low in nutrition	2	2	2	3	3	3	20	39
Little food value	2	2	1	2	1	3	19	38
Low in fiber	32	8	32	26	29	17	25	28
Fresh	69	85	67	45	54	52	14	12
Part of a well balanced diet	72	84	76	67	80	71	16	11
Nutritious	91	85	77	65	77	68	32	16
Good for growing children	80	81	67	59	70	58	20	18
Wholesome	77	74	64	43	59	58	17	16
Good source of vitamins and minerals	71	77	41	37	41	57	21	8
Provides roughage and fiber	2	62	3	7	6	28	11	14
Good source of protein	50	17	68	73	73	21	24	5
Provides quick energy	33	53	18	15	13	16	18	10
Few preservatives/additives	45	63	59	45	56	57	15	14
Natural	61	81	71	36	55	68	6	7
Low in carbohydrates	16	38	27	27	40	10	3	8
Product/trust	63	70	63	47	61	60	20	31
Low in cholesterol	11	51	5	13	43	32	5	18
Good food value for the money	56	62	68	55	76	68	18	27
Expensive	22	38	8	30	8	5	48	8
Good tasting	66	81	65	72	78	69	72	53
I enjoy eating frequently	27	75	49	61	72	59	50	32
Liked especially by adults	27	59	59	59	66	63	56	32
Liked especially by children	60	62	25	56	51	38	73	47

Q. 29 - For each product listed across the top below, please "X" the statements which, in your opinion, describe that product. First, "X" the statements for "Macaroni (Dry Packaged)." Then, go to "Potatoes," and so on.



Consumer Attitudes

(Continued from page 17)

Miscellaneous Product Profiles
Proportion Of Sample Who Agree With Statement

	Chicken	Ground Beef	Baked Potatoes	Spaghetti with Meat Sauce	Macaroni And Cheese	Tuna Noodle Casserole	Macaroni Salad
Fattening	4%	17%	32%	63%	61%	37%	50%
Filling	45	51	73	81	77	74	64
High in starch	1	2	69	72	76	59	68
High in calories	5	25	26	63	63	45	51
High in carbohydrates	3	7	39	47	49	40	45
High in salt	2	4	2	32	27	30	20
High in sugar	1	1	1	7	4	4	6
Bad for you	1	3	2	5	5	4	5
High in fat	12	46	5	26	24	12	17
High in cholesterol	6	27	5	24	30	15	17
Junk food	1	2	1	2	3	2	4
Low in nutrition	3	3	3	5	5	5	16
Little food value	1	2	3	5	6	5	16
Low in fiber	29	26	17	29	32	31	32
Fresh	54	45	52	20	20	19	26
Part of a well balanced diet	80	67	71	48	52	55	37
Nutritious	77	65	68	62	62	65	47
Good for growing children	70	59	58	53	57	53	34
Wholesome	59	43	58	43	43	46	33
Good source of vitamins and minerals	41	37	57	40	39	46	32
Provides roughage and fiber	6	7	28	15	13	14	17
Good source of protein	73	73	21	52	53	60	23
Provides quick energy	13	15	16	25	25	22	17
Few preservatives/ additives	56	45	57	26	26	27	25
Natural	55	36	68	18	21	18	16
Low in carbohydrates	40	27	10	6	4	10	6
Product/trust	61	47	60	43	46	37	32
Low in cholesterol	43	13	32	11	8	20	14
Good food value for the money	76	55	68	63	67	64	47
Expensive	8	30	5	11	6	14	7
Good tasting	78	72	69	80	76	66	66
I enjoy eating frequently	72	61	59	62	53	36	36
Liked especially by adults	66	59	63	68	55	56	55
Liked especially by children	51	56	38	72	68	30	23

Percentage Who Regularly Consume Specific Products By Various Demographics

	Spaghetti	Macaroni	Donuts
Total Sample	23%	21%	4%
Age Of Respondent			
Preteen	33	36	23
Teenagers	31	29	11
Adults	24	21	4
19 - 25	29	28	5
25 - 34	28	27	5
35 - 44	31	26	3
45 - 54	24	18	4
55 - 64	18	13	3
64 and over	9	7	2
Female Age			
Preteen	34	37	7
Teenagers	30	28	7
Adults	22	21	3
19 - 25	29	31	4
25 - 34	27	27	4
35 - 44	29	24	2
45 - 54	22	20	2
55 - 64	16	12	3
64 and over	9	8	2
Male Age			
Preteen	32	35	10
Teenagers	31	28	9
Adults	27	20	6
19 - 25	30	20	7
25 - 34	29	26	8
35 - 44	36	29	6
45 - 54	28	14	7
55 - 64	25	16	4
64 and over	9	5	3
Presence Of Children*			
Children	31	29	4
No children	18	15	4
Size Of Family*			
One	12	10	4
Two	18	15	4
Three to four	28	27	4
Five or more	38	29	4
Household Income*			
Under $10,000	22	22	6
$10,000 - $14,999	22	19	3
$15,000 - $19,999	21	20	3
$20,000 - $29,999	27	23	3
$30,000 or more	24	19	3
Geographic Region*			
East	32	26	4
North	20	18	4
South	24	22	4
West	18	16	3
Nutrition Concern*			
High	21	16	2
Medium	23	21	4
Low	27	23	4
Nutrition Perception*			
High	24	21	3
Medium	23	21	4
Low	27	23	5

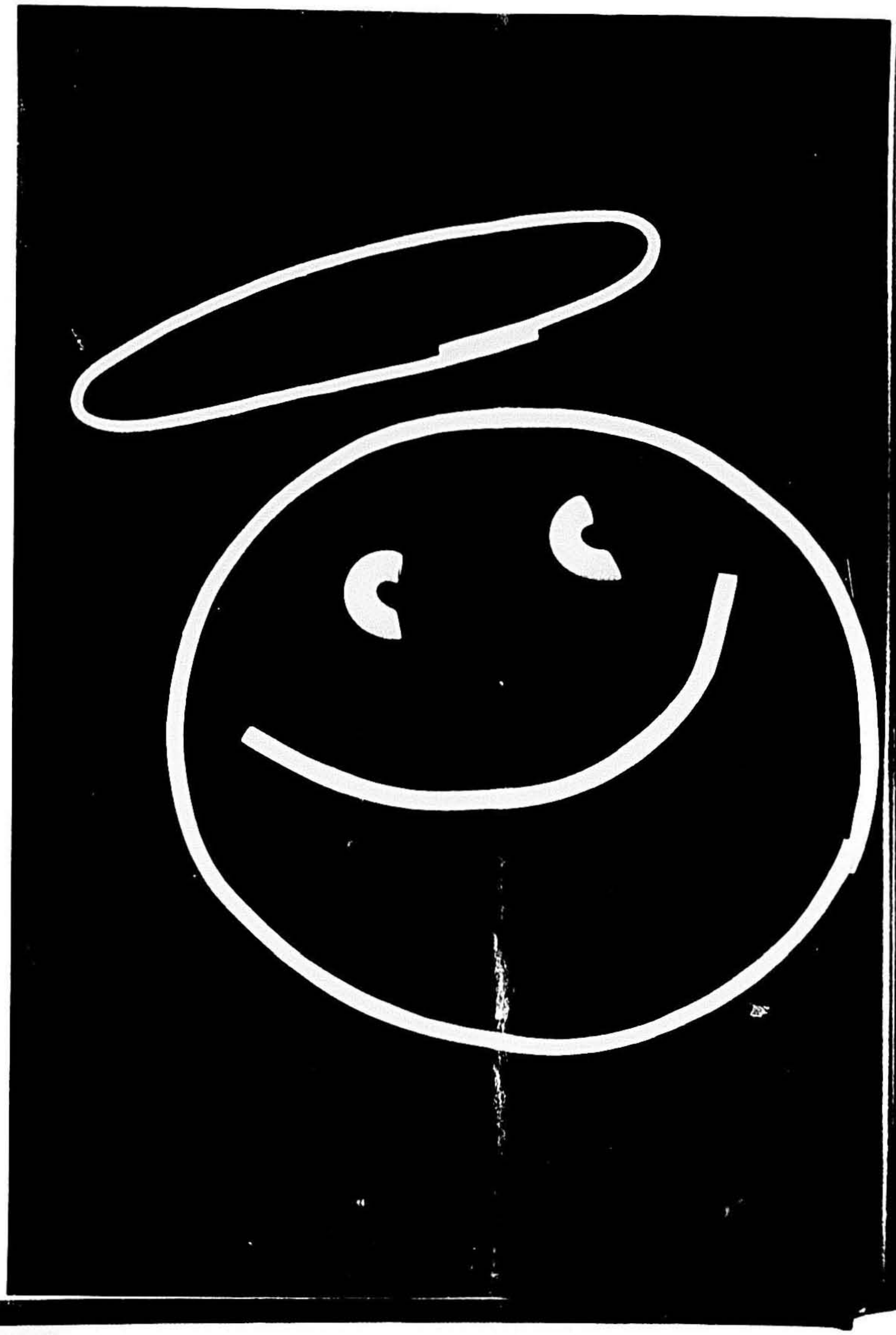
*Based on adults who regularly eat.

Q. 38 - Please "X" the persons below that you have in your household. Then, for each one, "X" the box that indicates how frequently each person eats the products listed below.

Profile of Frequent Users
Selected Pasta Products

	Total Sample		Serve Frequently					
			Spaghetti		Macaroni		Egg Noodles	
	%	Index	%	Index	%	Index	%	Index
Age								
Under 25	18	100	22	122	19	106	13	72
25-34	23	100	24	104	26	113	25	109
35-44	15	100	19	127	18	120	15	100
45-54	14	100	14	100	14	100	16	114
55-64	14	100	11	79	11	79	15	107
65 and over	16	100	11	69	12	75	16	100
Race								
White	87	100	86	99	87	100	91	105
Non-White	12	100	13	108	12	100	8	67
Region								
New England	5	100	7	140	5	100	5	100
Middle Atlantic	15	100	22	147	17	113	16	107
East North Central	20	100	19	95	19	95	25	125
West North Central	8	100	6	75	10	125	10	125
South Atlantic	17	100	15	88	17	100	14	82
East South Central	7	100	6	86	7	100	4	57
West South Central	10	100	10	100	11	110	9	90
Mountain	5	100	4	80	4	80	5	100
Pacific	13	100	11	85	10	77	11	85
Size of Family								
One person	16	100	10	63	10	63	9	56
Two persons	33	100	27	82	29	88	33	100
Three or four	39	100	44	113	43	110	39	100
Five or more	12	100	19	158	17	142	18	150
Marital Status								
Single	7	100	5	71	3	43	3	43
Married	74	100	80	108	80	108	80	108
Other	19	100	15	79	17	89	16	84
Parents	42	100	52	124	52	124	46	110
Household Income								
$30,000 or more	22	100	23	105	20	91	24	109
$25,000-$29,999	10	100	9	90	10	100	11	110
$20,000-$24,999	13	100	13	100	14	108	14	108
$15,000-$19,999	14	100	12	86	13	93	14	100
Under $15,000	41	100	43	105	43	105	38	93

Note: An index greater than 100 shows coverage higher than the average (100). An index less than 100 shows coverage lower than the average.



Pasta is in the "Good Group"

New research shows pasta releases the right complex carbohydrates – rewards us with better health, slowed aging and built-in weight control.

[illegible] which [illegible]

[illegible] **pasta produces a flat reading on insulin release** [illegible]

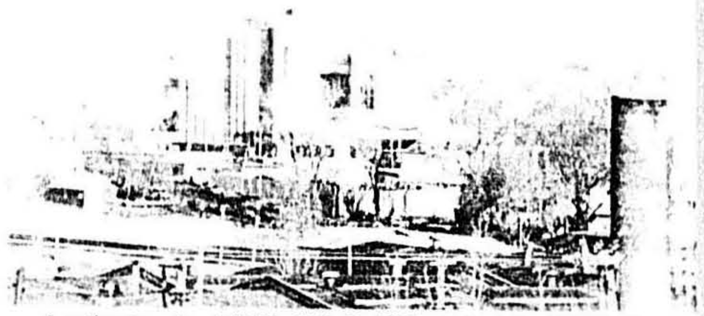
Pasta – let's tell it like it is.

ADM

ADM also supplies quality shortening, corn sweeteners, CO_2, soy proteins, dough conditioners and vital wheat gluten for the baking industry

Multifoods' Saint Paul "B" Mill Prepares for the Future

A view of the new gravity loading bins. The state capitol can be seen in the far right background.



A southeastern view of Multifoods' St. Paul "B" mill, located at 805 Rice Street.

Meeting the present and future needs of the growing durum and semolina industry was the reasoning behind International Multifoods' recent upgrading and capacity expansion of its "B" mill in St. Paul, Minn.

Multifoods has for more than 25 years operated three durum units, as well as a swing durum flour unit in Wabasha, Minn. Two of the durum mills, the "B" mill in St. Paul and a site in Baldwinsville, N.Y., exclusively produce semolina. The St. Paul "A" mill is exclusively for durum flour, as is the Wabasha site.

A study of the pasta industry and its future was conducted by Multifoods in the late 1970s. A need was determined for additional production capacity, based on pasta consumption trends and opportunities in the durum area.

The Industrial Foods Division saw its St. Paul "B" mill facility as the logical place for semolina capacity expansion. The decision was based on St. Paul's close access to durum wheat growing areas and the available transportation flexibility to reach the entire heavy pasta-consuming market east of the Mississippi.

Extensive Upgrading

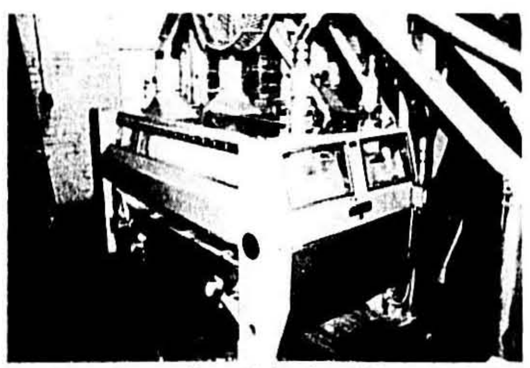
The extensive upgrading aspects of the project have made the "B" mill more efficient and able to maintain the high product quality level required by the pasta industry. And, because Multifoods is a major supplier to the pasta industry and is highly regarded by the important buying groups, the project was deemed a major element in the Industrial Foods Division's operating plans.

No less important are the peop[le] making the whole thing work for Multifoods. "Our employees and mille[rs] at the "B" mill bring more than 4[0] combined years of experience an[d] knoweldge to our operation," sa[ys] Frank Chimento, plant manager. "Th[ey] kept our operations running with lit[tle] disruption while the capacity increas[e] and upgrading projects were going o[n] around them."

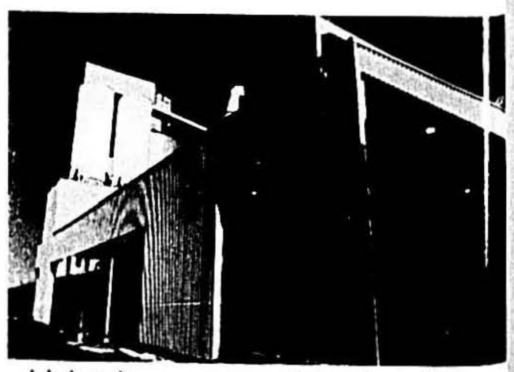
The capital improvements made [at] the "B" mill were substantial. Its ca[pacity] was increased to 8,000 cwts-per-day from its 5,600 cwts.-per-da[y] level, a 43 percent jump. The proje[ct] improved from semolina grade extraction and raised elevator wheat yield by reducing wheat loss to screenings. Also, equipment added to produce high purity and commercial wheat germ further enhanced the facility

Designed by Multifoods' Corporat[e] Engineering department, the capita[l]

(Continued on page 26)



One of several new purifiers added to the mill flow at the St. Paul "B" mill.



A look at the new canopy over the semolina loading area.

Multifoods "B" Mill

(Continued from page 24)

improvements began in 1981 and were finished in late 1982. Additional fine-tuning enabled the plant to reach the higher output level by October 1983.

The project consisted of adding one story to the existing building structure, revising the cleaninghouse and mill flow, and installing supplementary cleaning equipment, roll stands, purifiers, sifters and complementary equipment to achieve improvements in yield, grade percentage and capacity increase. The project also included two 1,600 cwt. bulk storage/loadout bins, additional railroad track and canopy, a new boiler, a high purity germ system, a bulk feed loadout system and feed conditioning equipment.

New to the "B" mill was the replacement of pneumatic systems for bulk car loading with time-saving and efficient gravity loading systems. Further adding to the site's overall upgrading was a car wash facility that thoroughly cleans the rail cars before they're loaded.

A separate building was constructed to house a new feed tower and gravity loading tank. New locker and lunchroom facilities, a laboratory and millers' offices were also part of the entire project.

Overall, the improvements throughout the "B" mill site will enhance Multifoods' durum semolina business for years to come. By preparing now for the future, Multifoods will continue to satisfy customers with the products and services upon which it has built its strong reputation for quality.

Conagra's Commitment to the Pasta Industry

The merger of the ConAgra and Peavey businesses in 1982 made the consolidated ConAgra Flour Milling Company the number one flour miller in the U.S.

It also established ConAgra as the major supplier of durum semolina to America's pasta producers.

Industry leadership brings with it added responsibility. In this regard, ConAgra's philosophy of business and customer service extends to being responsive to industry trends and developments.

One of the most recent events that has been a foremost topic of concern in the pasta industry is that of foreign imports and their subsidies.

ConAgra, working with the National Pasta Association, developed a program to create awareness on the part of the newspaper food editors and, in-turn, the public.

LANCASTER

The program, "World's Best Pasta. Made in the U.S.A.," was an information kit containing sections on the import subsidies situation, a nutritional profile of pasta, a history of pasta, a pasta fact sheet, recipes collection, and line illustrations and color transparancies.

A cover letter from Vice President and General Sales Manager of the ConAgra Flour Milling Company, Bob Stephenson, brought the kit into perspective for the editors.

"Lately you've been hearing that to make really good pasta you have to buy an imported brand," wrote Stephenson. "Not so. Naturally, as America's largest miller of durum for pasta, we think pasta makes a great story for your readers any time. But right now, with the imports making inroads into America's markets, we think it's especially timely."

Stephenson went on to discuss the quality of U.S. pasta and the artificial pricing of imports due to subsidies.

The food editors of the top 500 newspapers around the country received personalized kits in October of last year. In addition to the editors, 150 of the top grocery executives in the U.S. received the kit with another cover letter from Bob Stephenson, explaining the import subsidies situation from ConAgra's concern.

Response from the food editors, the trade and the pasta industry was both immediate and favorable.

Feature articles resulted in newspapers from Maine to California. Nearly 100 papers contacted ConAgra for additional information and requests for art — these papers alone totaled a circulation figure in excess of 7 million.

ConAgra is currently looking into other NPA programs to support the U.S. pasta industry in the future.

Planting Intentions

According to the U.S. Department of Agriculture's survey of farmers' planting intentions, durum area in 1984 will be 3,850,000 acres, up 50% from 2,565,000 acres a year ago but 11% below 4,350,000 for 1982. Durum area would be 34% below record 5,876,000 acres in 1981. North Dakota durum area is put at 3,100,000 acres, up 48% from 2,090,000 last year.

Plantings in Montana are indicated at 300,000 acre, up 43% from 210,000 a year ago. Minnesota area is 115,000 acres up 188% from 40,000 in 1983. Seedings in South Dakota are put at 130,000 acres, up 63% from 80,000 the year before. "Desert durum" in California and Arizona, mainly fall-planted varieties, are expected to be 205,000 acres, up 41% from 145,000 a year ago.

Stocks at Two Year Low

A 50-percent production cutback was certain to affect a commodity that had faced record supplies for two years. This is the situation for Durum wheat in 1983/84. Correspondingly with demand staying relatively strong Durum prices went to a premium, far above those of other classes. Farm prices above $4 a bushel have been a regular occurrence, with terminal market prices frequently above $5 a bushel. Durum stocks on January 1 were a reported 133 million bushels 30 percent below last January. About 80 million bushels were stored as part of the isolated stocks in the grain reserve program. Liquidation of these large holdings by spring wheat producers designating these stocks as their PIK entitlements should temper further price strength, thereby aiding U.S. Durum competitiveness on the world market.

Reduced foreign Durum supplies including a 12-percent decline in available Canadian supplies, has helped stimulate world buying interest in U.S. stocks. As the later half of 1983/84 starts to unfold, export commitments are 17 percent above last year's pace. Shipments for this season should nearly match the 5-year annual average of 71 million bushels.

Growers are expected to react to the favorable prices and to plant more acres in 1984. Depending upon the response to the ARP, the Durum outlook in 1984/85 may be heading toward the upside of the up-and-down pattern that typifies Durum production.

Toward Reason on EDB

Regulations to remove ethylene dibromide (EDB) from the nation's food supply can be a disservice to consumers if not administered in a reasonable, scientific and coordinated manner, a panel of experts in nutrition, toxicology and environmental health warned in March. In a Boston press briefing focusing on the scientific validity of the EDB guidelines set out by the Environmental Protection Agency, the panel emphasized that if really interested in promotion and protection of good health, state regulatory agencies should be encouraging, rather than discouraging, consumption of grain-based foods.

No one in the food industry has attempted to minimize the desirability of removing EDB from the nation's food supply as quickly as possible. The panel assembled by the Grocery Manufacturers of America echoed earlier observations in breadstuffs that reason must prevail, that to do otherwise is not in the public interest.

The indication last week that Massachusetts is the only state not to accept, at least for the time being, the E.P.A. guidelines, suggests that reason may yet rule. No one, particularly the consumer, stands to gain from any other course.

Regulatory efforts governing ethylene dibromide (EDB) in the nation's food supply must not jeopardize the availability of grain-based foods or the public's confidence in them, it was emphasized at a press briefing sponsored by the Grocery Manufacturers of America.

A five-member panel of experts in toxicology, nutrition, environmental health and quality assurance said the dangers of EDB has been greatly exaggerated and that residue standards more stringent than proposed by the Environmental Protection Agency were unnecessary to protect the public health.

G.M.A. Representative

Noting that the state of Massachusetts scheduled to implement new regulations setting the limit for EDB residue in grain-based products at 1 part per billion, panel members said this regulatory effort "has no scientific basis," and G.M.A. representatives warned that tests conducted by member companies in January indicated that up to 90% of some grain-based foods would not meet the Massachusetts standard.

Jeffrey Nedelman, G.M.A. director of public affairs, said that it will be illegal in Massachusetts "to hold, accept, sell or distribute" grain-based products that do not meet the state's standard. "Each company — bakery, pasta manufacturer, bagel shop and flour distributor — is going to have to make independently some very, very difficult choices."

Mr. Nedelman said the press briefing was scheduled to make public the scientific facts of the EDB issue, stating that Massachusetts consumers were being "needlessly alarmed." G.M.A., he said, believes the EDB guidelines issued by the Environmental Protection Agency "are based on the most extensive review of science available and provide a wide margin of safety for the public." In reviewing G.M.A.'s position, Mr. Nedelman said, "We are committed to removing EDB from the nation's food supply as quickly as possible."

G.M.A. test data, he said, show that 40% of the wheat and 16% of the corn received by processing plants contains some EDB. "It is technically impossible for the industry to comply with the 1 ppb standard which is scheduled to take effect next Wednesday in the Commonwealth," Mr. Nedelman said. "This will have a very adverse impact on nutrition and health of the people in Massachusetts and a profound economic effect on local businesses."

Mr. Nedelman said the January testing conducted by G.M.A. member companies indicates the following percentages of grain-based foods will not meet the 1 ppb standard set out by Massachusetts:

Flour, 90%; cake mix, 91%; pasta, 40%; corn meal mix/corn flour, 90%; bread, 13%; cakes and donuts, 28%; cookies and crackers, 36%, and corn bread, 33%.

"It is G.M.A.'s position," Mr. Nedelman said, "that the 1 ppb limit has no scientific basis, and will result in a terrible waste in terms of nutrition, unavailability of food products and lost jobs."

General Mills Man

Warren M. Schwecke, vice-president of quality assurance and director of quality control for Consumer Foods, General Mills, Inc., Minneapolis, in reviewing food industry efforts to reduce EDB levels, emphasized the difficulties of absolute control because of grain marketing practices and variations in EDB residues within the same shipment of grain.

Noting that EDB will not be used on 1984 crop grain, Mr. Schwecke said this grain will be mixed with wheat from previous harvests, reducing EDB levels by more than 60%. He said that EDB residues "will continue at some trace level for two or three years until all existing stored grain has been moved through the system." Mr. Schwecke described E.P.A.'s standard on EDB as "reasonsible," and said that it was impossible for the food industry to meet standards such as 1 ppb or 10 ppb.

"In our judgment," Mr. Schwecke said, "the right way to work our way out of this is to work together with the E.P.A., Food and Drug Administration and other federal and state agencies through a reasonable regulatory network. This involves reasonable tolerances and sound sampling schemes that recognize the variability that exists not only in the grain but from package to package."

Environ Corporation

Dr. Joseph V. Rodricks, a founder of Environ Corp., Washington, and a member of the Advisory Board on Toxicology and Environmental Health for the National Academy of Sciences, said that EDB residues in grain products "do not pose a significant public health hazard. The E.P.A. levels are adequate to ensure that this risk remains insignificant."

Dr. Rodricks said that based on per capita consumption of grain products the average daily intake of EDB in grain products is more than 1 million times lower than the levels used to produce cancer in laboratory animals.

Stating that Massachusetts is striving for "theoretical zero" in EDB residues, Dr. Rodricks said, "Changing the E.P.A. standard would change the EDB risk from 'trivial' to 'slightly less trival.'"

American Health Corporation

Dr. John H. Weisburger, vice-president of research, American Health Foundation, Valhalla, N.Y., who developed the test procedures at the National Cancer Institute for determining carcinogenicity and discovered that EDB causes cancer in laboratory animals, told the press briefing that "EDB is just not a problem at the levels that will exist in 1984 and 1985." He said the residue levels under the E.P.A

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Toward Reason on EDB

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guidelines "are perfectly acceptable."

"I would suggest to the Commonwealth of Massachusetts that there are more important things that they ought to do to prevent disease," Dr. Weisburger said, pointing to cigarette smaking and diet as factors in both cancer and heart disease. He continued:

"The average American diet is twice as high in fat as it should be. Numerous studies have emphasized that importance of eating more cereal fiber. Here we are dealing with 'contaminated' cereals and I think this EDB issue is totally counterproductive, because the public needs to be encouraged to eat food with more fiber.

"I wish I had 10% of the money we are spending discussing EDB for my research on what really causes heart disease and cancer. EDB at the low level chemists can detect is not a problem."

Nutrition Consultant

Marianne Gibbons, a nutrition consultant at Boston City Hospital and a lecturer in nutrition at Boston University Medical School, said the Massachusetts EDB issue raised questions on availability of an adequate supply of nutritious food in the Commonwealth as well as being contradictory to recommendations for increasing use of grain products. In urging that the EDB issue be approached from the standpoint of cost/benefit analysis, she said:

"I don't mean a profit and loss or political perspective but health and safety.

"I am concerned that the public tends to generalize, especially under conditions of stress, and may decide to reject all grain products, all fruit and vegetable products.

"We are not talking about a choice between cake mix or muffins. We are talking about flour, we are talking about bread, we are talking about staples in the American diet.

"Grain products offer inexpensive, easy, versatile means of obtaining calories. Ideally, 45% to 55% of caloric intake should be in terms of complex carbohydrates. Grain products also supply us with B vitamins, some protein and fiber. It is important that we continue to make these foods available."

The Massachusetts Food Association, a state-wide organization of food retailers in the Commonwealth, will join the Grocery Manufacturers of America and other food industry groups in protesting new limits on ethylene dibromide (EDB) residues in food that are more stringent than the guidelines prepared by the Environmental Protection Agency. Milton W. Segel, president of the state association, told *Milling & Baking News* that retailers in Massachusetts have been placed "in an impossible situation" by state regulations that do not conform with those of other states. Mr. Segel pointed out that the Massachusetts regulations are "unenforceable, meaningless and unfair." He said member retailers indicate that sales of some grain-based foods, particularly flour and cake mixes, are down sharply because of the publicity surrounding the EDB issue in that state. "If the manufacturers can't meet the regulation, we can't either," Mr. Segel said. "There's no question that the first concern of the food manufacturers will be the other 49 states."

Pathologist

Sharpest criticism of the Massachusetts regulations was voiced by Dr. Joseph Vitale, director of the nutrition education program in the nutritional pathology unit, Mallory Institute of Pathology, Boston University.

"I find no evidence that there is cause to be alarmed, no data to suggest that EDB has been involved in cancer causation in humans," Dr. Vitale said. "There is no evidence that there has been a single death attributed to EDB consumption in the American diet." He said some statements made by Massachusetts officials at February hearings on the EDB issue were "incorrect, sadistic, unclear and meaningless" and had the effect of "scare tactics."

Dr. Vitale said that legislators, health policy planners and the news media should voice concern, "but not hysteria," about potential carcinogens and other environmental hazards. "What is needed is perhaps a little more common sense on the part of our public health officials and perhaps a need for more perspective and retrospective kinds of studies to determine really what is safe and unsafe, and, more important, what is true." Dr. Vitale said he, too, is concerned about the nutritional impact of the Massachusetts regulations, stating, "Cereals and grains are the mainstay of the American diet."

Pillsbury Booklet: "EDB: An Update"

What is EDB? EDB is an acronym for ethylene dibromide, a petroleum based pesticide and soil fumigant widely used by the citrus and grain industries. It is now generally recognized that EDB is a cancer-causing agent. For that reason, it is particularly important to understand how EDB has been used in the United States.

Since 1948, EDB has had two primary uses . . . as a pesticide and as an additive in gasoline.

How much EDB is used in the U.S.? Over 280 million lbs of EDB are produced in the U.S. each year.

Of that, 92% is used as the anti-knock agent in gasoline.

The remaining 8% has been used as a pesticide for various agricultural activities.

Of that portion directed to agriculture, over 99% has been used for preplant soil fumigation where EDB was injected into the soil. Citrus, pineapple, soybeans, cotton, tobacco and over 30 other fruit, vegetable and nut crops were protected this way.

As a result, less than 1 million lbs or 0.4% of all EDB produced in the U.S. has been used to:

—fumigate citrus
—fumigate grain
—fumigate milling machinery

In the citrus industry, fumigation has been used to prevent the spread of tropical fruit flies. Fumigating grain and milling equipment prevents insect infestation. It is this relatively small amount that has caused the concern we've seen in the last several weeks. To further understand the situation, let's look at the history of EDB in the U.S. food system.

History

For some 36 years, EDB was injected into the soil to protect primarily fruit and other crops from attack by rootworms.

It was used on the farm to control insects in stored grain — grain that could be stored up to five years at a time.

Similarly, it was used at large elevators to control insects on grain that was stored for as long as one to two years.

And it was used by flour millers and processors as a spot fumigant on pieces of milling equipment where

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Pillsbury Booklet

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flour could be hidden and insects could infest.

But in 1983, things began to change. In September of that year, the Environmental Protection Agency, E.P.A., rules that use of EDB for soil fumigation would be banned, but allowed quantities already in stock to be used within the next 12 months.

Also in September 1983, with results of EDB testing becoming known to the food processing industry, Pillsbury and others in the milling industry voluntarily stopped any further use of EDB.

Then on Feb. 3, 1984, the E.P.A. eliminated the last use of EDB in the grain food system by establishing an emergency ban on stored grain fumigation.

Now, in effect, EDB has been eliminated from entering the food grain system. But due to the amount of product currently in storage, production processing and on shelves, it will take an estimated three years for the U.S. food grain system to purge itself of EDB.

The question then is, how do we manage what EDB is in the system now? On Feb. 3, the E.P.A. addressed this matter by issuing guidelines that recognized the concerns of two groups — the consumer and the food industry.

From the consumer's standpoint, the guidelines guard against potentially unhealthy levels of EDB in grain foods.

Such standards include three links in the food chain. Raw grain at 900 parts per billion, ppb; processed products on the shelf at 150 ppb., and read-to-eat products at 30 ppb.

By establishing these three levels, the E.P.A. recognized the significant reduction in EDB that occurs in various steps of the food chain due to time, air and temperature.

For example, from the raw grain to the milling stage, EDB is reduced by aeration and removal of the seed coat.

EDB levels also are effectively reduced, and in many cases eliminated, through the processing of food products from mix to ready-to-eat stages.

While the E.P.A. guidelines offer protection to the consumer, they also offer important benefits to the food industry.

First, the guidelines do not force huge amounts of grain or packaged products to be destroyed. While the industry wants EDB removed from the food system, it also must have guide lines that provide manageable levels for product currently existing within the food grain system. The E.P.A. guidelines effectively accomplish that.

Secondly, the guidelines establish a national level for all states to adopt. Prior to Feb. 3, there were no directions in existence and some individual states chose to adopt their own guidelines — a method that presented significant problems to the food industry.

Thirdly, the guidelines identify universal procedures for sampling and testing products for EDB. Because of the variance in detectable amounts of EDB from one package to another, it is important that testing methodology include representative samples.

In short, The Pillsbury Co. is in total support of the recent efforts and guidelines of the E.P.A. The guidelines will help tremendously in leading to an orderly elimination of EDB in our food grain system.

We agree with those including E.P.A. administrator William Ruckelshaus who urge the public not to be overly concerned. While we are working to remove EDB from the system as soon as possible, we also believe EDB poses no immediate health hazard to consumers.

To help put the risk factor of EDB into proper perspective, it is helpful to consider the following illustrations:

For example, let's remember that levels of EDB are being measured in parts per *billion* — a number so small that it often is hard to comprehend. In fact, one part per billion is equivalent to one second in 31.7 years.

Now that EDB is banned, risk factors from eating foodstuffs containing EDB residues also are noteworthy when compared to other activities. For example, as compared to eating food containing allowed levels of EDB, the risk is

280 times less than that from sunradiation absorbed during one transcontinental airline trip:

or 2,799 times less than sharing an office or residence with a person who smokes;

or 400 times less than drinking two liters of chlorinated water per day in a major U.S. city.

To summarize the situation, EDB does not belong in this country's food grain system and Pillsbury is committed to achieving its elimination.

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Semolina Output Up

Production of straight semolina and durum flour increased 4% in 1983 according to statistics gathered by the Bureau of the Census. Output of straight semolina and durum flour in 1983 was 14,674,000 cwts, compared with 14,124,000 in 1982, an increase of 550,000. It also was up 9% from 13,455,000 in 1981, the recent low. On the other hand, it was off slightly from the 14,720,000 recorded in 1980 and down 16% from the high of 17,404,000 in 1979. The latter year is the largest on record since the start of separate compilations in 1966.

Semolina

Straight semolina and durum flour production for a series of calendar years follows, in cwts:

1983	14,674,000
1982	14,124,000
1981	13,455,000
1980	14,720,000
1979	17,404,000
1978	16,292,000
1977	16,363,000
1976	15,349,000
1975	13,825,000
1974	14,003,000
1973	16,334,000
1972	14,986,000
1971	15,251,000
1970	14,813,000
1969	13,475,000
1968	12,749,000
1967	12,534,000
1966	12,411,000

Mill Grind

Production of durum wheat products and grind with comparisons, follow:

— 1983 —

	Semolina (1,000 cwts.)	Grind (1,000 bu.)
January	1,276	2,8[illegible]5
February	1,275	2,7[illegible]5
March	1,278	2,8[illegible]1
April	1,023	2,2[illegible]9
May	1,194	2,6[illegible]6
June	1,094	2,3[illegible]2
July	1,022	2,2[illegible]2
August	1,579	3,4[illegible]5
September	1,500	3,3[illegible]2
October	1,386	3,1[illegible]8
November	1,103	2,5[illegible]1
December	944	2,4[illegible]4

— 1982 —

	Semolian (1,000 cwts.)	Grind (1,000 bus.)
January	1,400	3,181
February	1,206	2,733
March	1,308	2,956
April	1,030	2,303
May	1,065	2,452
June	1,142	2,567
July	1,056	2,392
August	1,224	2,727
September	1,324	2,914
October	1,170	2,685
November	1,103	2,488
December	1,096	2,454

From the Hershey Annual Report

San Giorgio-Skinner Company achieved record levels of sales and operating income for the fifth consecutive year. This was an especially gratifying performance because all five of the Company's brands, San Giorgio, Skinner, Delmonico, P & R, and Light 'N Fluffy, made positive contributions to this record in a marketplace where competitive activity continued to intensify.

As in 1982, generally stable commodity costs continued to make heavy promotional activities possible which resulted in further increases in the level of competitive activity among domestic firms. There was also a continued influx of lower priced imports which impacted the marketplace. Against this background, the San Giorgio-Skinner brands enjoyed volume increases and improved their overall market share. The Company also achieved improved operating margins.

The San Giorgio brand was particularly vigorous in the New York City market where it was the only major domestic brand to gain market share in the face of a rising tide of subsidized imported brands. The brand also gained major new distribution in its expansion to the Virginia market.

The Skinner brand had one of its finest years, gaining key distribution in the Wisconsin, Alabama, and West Texas markets. As a favorite brand in many parts of the Sunbelt, it has been a beneficiary of a population that is both growing in numbers and consuming more pasta.

Both the Delmonico and P & R brands remained strong during the year and further enhanced leadership positions in their respective marketing areas. Geographic expansion of Light 'N Fluffy Dumplings and Light 'N Fluffy Ripplets propelled that brand to new highs in sales for the year.

Although imported pasta is being purchased in increasing amounts, consumers are turning away from less expensive generic products. Private label pasta sales also declined as consumer buying momentum continued to swing back toward branded products in the improving economy.

There was an adequate supply of durum wheat in 1983 because of the excellent harvests in 1981 and 1983. Production in 1983 was 32 percent below 1982 due to the Federal government's Payment in Kind Program and reduced yields because of the extremely hot weather. Despite this decline in production, there was an adequate durum harvest in the fall of 1983.


Richard E. Bentz

With sufficient durum stocks, continued growth is expected for the American pasta industry as a whole and San Giorgio-Skinner Company's brands in particular. To prepare for that growth, both the Omaha and Lebanon plants are marking substantial additions to production capacity with completion dates in mid-1984.

Brazilian Subsidiary

Petybon Industrias Alimenticias Ltda., Hershey's wholly-owned Brazilian subsidiary, had improved operating results in 1983 compared with the previous year. Petybon's sales contribution to this segment increased primarily as a result of the inclusion of a full year's sales in 1983 versus only six month' in 1982. In mid-1982, Hershey purchased the remaining interest in Petybon which was previously a 40 percent-owned joint venture.

Operating income improved in 1983 compared with 1982 despite the severe economic environment in Brazil, including government-mandated controls during part of 1983 which prevented Petybon from increasing selling prices sufficiently to maintain operating margins. This improvement was achieved through a number of cost-containment programs implemented by the Company Interest expense increased significantly, however, reflecting higher levels of short-term borrowings at increased interest rates to support working capital requirements.

With the general decline in purchasing power, the Brazilian consumer has been trading down from higher-priced premium items to lower-priced pasta and biscuit products. To meet the demand, Petybon adapted its product line and increased sales of its lower-priced familiar pasta and biscuit lines, as well as its margarine lines. In addition, the Company successfully launched a new tea biscuit called Pavana which has gain good consumer acceptance.

Richard E. Bentz Promoted

Richard E. Bentz, has been promoted to Vice President, Finance, San Giorgio-Skinner Company, C. Mickey Skinner, President and Chief Executive Officer, announced.

San Giorgio-Skinner Company is the pasta division of Hershey Foods Corporation. San Giorgio-Skinner Company, with its San Giorgio, Skinner Delmonico and P & R brands, has manufacturing facilities in Omaha, Neb.; Louisville, Ky. and Lebanon, Pa.

In his new position, Bentz will continue to serve as Chief Financial Officer of San Giorgio-Skinner Company and will assume new responsibilities for divisional logistics and facilities planning.

Bentz joined Hershey Foods Corporation in 1975 as a Senior Financial Analyst in the Corporate Finance Department. He served as Controller for SanGiorgio Macaroni Company from 1976 to 1980. In 1980, he was named Controller for San Giorgio-Skinner Company. He became Director of Finance/Controller in 1982.

Before joining Hershey, Bentz was Manager of Financial Analysis and Planning, International Teleprinter Division of the Singer Company in New Jersey.

Bentz has a B.S. degree in production management and a Master of Business Administration degree from The Pennsylvania State University. He is a member of the National Association of Accountants and has served as an accounting instructor on the adjunct faculty of Franklin and Marchall College in Lancaster, Pennsylvania.

Sage Saying

"We can produce wheat cheaper and more efficiently than the competition can, but we can't beat their subsidized export prices. We cannot fight subsidies and embargoes with efficiency and productivity. And we can't fight by cutting back production. That's no trade war. That's surrender." — Lewis A. Remele, ConAgra, Inc.

Paul Taylor Comments on Pasta War

"Operating margins for milling premium durum wheat into semolina have been squeezed by subsidized competition from Italy and, to a lesser extent, from Greece. American millers and wheat farmers have filed protests and formal complaints with international trade bodies, charging the European Economic Community with violating trade agreements in which is called the pasta war," wrote Lee Egerstrom, agra-business writer, St. Paul Pioneer Press.

Paul Taylor, Vice President and General Manager for International Multifoods, U.S. Industrial Foods Division, was interviewed for the story.

Some of the points of interest of pasta manufacturers are represented below.

About 150 million bushels of durum wheat a year is grown by farmers in western Minnesota, North Dakota, South Dakota, and eastern Montana, bringing them about $750 million a year. During most years, marketers, millers, processors, and transporters based or operating in the twin cities or Duluth would increase the value of that crop to more than $2 billion from value-added processing and handling services.

But faced with subsidized competition from Europe, margins for these services shrink and the farmer's price for durum wheat falls to about the price paid for wheat used for more ordinary bread flour.

Since Italy produced more semolina and pasta products than the Italian durum crop can support, Italy has become a major market for durum exports through the port of Duluth. Upper midwest durum is shipped to Naples and moved to processing plants throughout Italy, packaged, shipped back to Naples, placed in shipping containers and shipped back to the United States.

Taylor gave an example of processed pasta returning from Italy in the heart of St. Paul's Italian eastside, less than a mile from a Multifoods mill. It would sell for less than if the durum were moved from North Dakota to Minneapolis Grain Exchange, then across the river to St. Paul for milling into semolina, sent back to Creamette in Minneapolis and then on to supermarkets.

The benefits to farmers from the exports, most years, are likely washed away by reduced domestic demand for durum caused by imported pasta products. "Something isn't working right here, and it's hurting all of us," said Taylor.

The story was circulated to the Minnesota Congressional Delegation by Taylor with a positive response from Members of Congress.

New Equipment at Cando

Rotini, rigotoni, spaghettini, vermicelli, linquine, mafalda, solid macaroni, lasagna squares, even alpha-bits are being processed, packaged and sold at Noodles by Leonardo these days.

The Cando, North Dakota-based integrated milling-pasta making operation, owned by Leonard Gasparre, is now able to market some of the more exotic — at least for some parts of the country — pasta products named above, where previously they primarily made just long spaghetti and macaroni and shells.

In October of 1980 the first pasta came off the two installed lines after just over a year of construction and equipping the huge facility in south Cando.

Three and one-half years later those two lines still spit out the "noodles" but a third line has been added between the original pair that Plant Superintendent Tim Dodd says is "running like a charm. We're really pleased with its performance."

Don Lewis and Lynn Morter have been employed to set up the new line and will be starting on a fourth line on the south side of the plant soon — "we hope to have it ready by spring," Dodd said.

The new product line will add 35,000 pounds of finished product per day to the facility's original production of 168,000 pound per day.

Last year Noodles by Leonardo purchased seven pasta-making machines (lines) from Atlantic and Pacific Tea Co. of Horsehead, N.Y. which went out of business.

To make room for the new lines this last year Noodles added a 35,000 square foot metal warehouse building to the south side of the original concrete slab structure.

The new addition was made possible in part by a $300,000 North Dakota Community Development Block Grant Loan.

As market demand continues to increase for the Noodles products, three

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Stouffer Foods Distribution Center

Stouffer Foods, Solon, Ohio, announced it has begun construction of a new $10 million 80,000-sq-ft distribution center at its frozen prepared food plant in Gaffney, S.C.

The new full service distribution center will include a fully-automated storage and retrieval system and an order selection system. This will more than triple existing storage space and enable the company to better serve customers more efficiently.

Completion and startup of the new distribution center is scheduled for December 1984. The new facility is expected to create an additional 50 new jobs at the plant.

Webber/Smith and Associates, Inc. Lancaster, PA, has been contracted to do the design and engineering work for the center, which will be approximately 100 feet high with a volume of 3½ million cubic feet of storage space. Joseph A. Sedlak, Cleveland, Ohio will provide the engineering services for the center's material handling equipment and computer-related controls.

Swift/Hunt-Wesson Foods, Inc.

Swift/Hunt-Wesson Foods, Inc. has been selected as the name for the foods segment of Esmark, Inc., it was announced by Frederick B. Rentschler, president and chief executive officer of Swift/Hunt-Wesson Foods, Inc.

The name reflects the combination of the businesses of Swift & Company and Hunt-Wesson Foods, Inc. The company will be headquartered in Fullerton, California.

"We are very proud to announce the name of our new food company and believe it reflects the heritage of the companies that make up Swift/Hunt-Wesson Foods," Mr. Rentschler said.

"In the meat industry there is no prouder name than Swift. Hunt's tradition is as one of the largest packers of fruits and vegetables in the world. Wesson's roots are in the South as a cottonseed oil company, a tradition that—like Swift's—dates back to the last century. Wesson was also the first salad and cooking oil in national distribution," he added.

Swift/Hunt-Wesson Foods will have estimated annual revenues in excess of

...ion, and will market and distribute a variety of nationally known food products. These include: Hunt's tomato based products, Wesson salad and cooking oil, Orville Redenbacher gourmet popping corn and oil, Manwich sloppy joe sauce, Swift's Butterball turkeys, Swift's Brown 'N Serve sausages, Sizzlean breakfast strips and Peter Pan peanut butter.

Swift/Hunt-Wesson Foods represents the food segment of Esmark, Inc., the Chicago-based holding company with major interests in foods, chemicals, personal products, high fidelity and industrial products, vehicle rental and leasing and distilled spirits. ... owns Swift/Hunt-Wesson Foods, Inc., Estech, Inc., International Playtex, Inc., Max Factor & Co., Halston Enterprises, Inc., The McCall Pattern Company, Estronics, Inc., Avis, Inc., and Somerset Importers, Ltd.

Pillsbury Booklet

(Continued from page 32)

The actions taken by the E.P.A. represent important steps for both consumers and the food industry. Pillsbury is working to effectively rid our grain-based food system of EDB as quickly and efficiently as possible. Pillsbury continues to pledge its fullest cooperation in providing any assistance or information on the subject.

New Equipment at Cando

(Continued from page 36)

...tional lines will be added to the ... half of the original structure, for ...al of seven altogether. The re...ng two lines in storage will be ...le only if a new addition is made ... building in the future. Addi... mill renovation would also be ...ary.

...dles by Leonardo now exports ...of its product to Japan and has ...s along the West Coast, in Chi... St. Louis, Louisville and Ohio ... others.

...he last three years the employ... figures have risen to a total of ...

Families Dining Out More Often

The average number of times families visited restaurants — visit frequency — rose 1.5 percent during the fall quarter. This compares with a small 0.4 percent decline during the summer, a strong 2.7 percent gain in the spring and a slight 0.8 percent advance in the winter period.

An analysis of visit frequency by restaurant type shows that atmosphere /specialty restaurants experienced the largest gain of any category during the fall quarter — up 7.8 percent. Family style restaurants and cafeterias also posted an increase in visit frequency — 2.1 percent and 0.8 percent, respectively. Fast food restaurants, however, experienced a slight decrease in the average number of visits per family — 1.0 percent. These data support the assumption that the improved financial climate enabled many people to trade up and frequent more expensive establishments.

Restaurant Sales Up 8.5 Percent

CREST sales continue to post strong gains. They advanced 8.5 percent during the fall period. This compares with a 9.3 percent increase in the summer, a 7.6 percent rise in the spring and a 7.0 percent advance during the winter.

Increases in the average expenditure for a restaurant meal or snack — per person check size — were the most moderate of the year. During the fall quarter the average check size increased by 3.9 percent — down from 7.9 percent in the summer, 5.3 percent during the spring and 4.5 percent in the winter. The 3.9 percent increase in average check size is also lower than the 4.9 percent gain in menu prices recorded by the Consumer Price Index (CPI) for food away from home during the months of September, October and November.

ConAgra Sets Dividends

Omaha, Neb., March 12. — ConAgra, Inc., declared regular quarterly dividends of 28½¢ per share on the commons stock, payable June 1 to shareholders of record on April 27.

The board of directors also declared dividend of 62½¢ on the Class D preferred stock, payable April 1 to shareholders of record on March 16.

Status Spaghetti

Tired of tortellini? Sick of spaghetti? Fed up with fettucine? Next time you're in Italy, you can munch on Marille, the first new pasta in more than 50 years, according to its maker, Voiello. Following the recent trend of transforming ordinary objects—sheets, sweatshirts, even plain cotton underware—into so-called designer goods, Voiello hired Giorgetto Giugiaro, who has designed everything from cars to cameras, to re-invent Italy's favorite food.

Introduced in Italy last November, the new pasta looks something like a carpet that's been partly unrolled and folded over itself. Although one may think it silly to bring in one of the world's premier industrial designers to change what Italians put on their plates, Giugiaro insists that it was a demanding task.

"What fascinates me about designing pasta," Giugiaro told a reporter from *Europeo* magazine, "is the technical aspect. I never would have agreed to design a panettone, where there only exists a problem of shape. Instead, with macaroni, I've found an infinity of technical problems to solve, such as maximizing the pasta-sauce contact surface."

Naturally, Voiello's competitors doubt that the Italian public spends much time fretting about their pasta's surface area or its creative origins. "Do you know how much people care that their pasta be signed by a big designer?" asked Giampalo Slaviero of Buitoni, one of the largest pasta makers. "I'll tell you not at all. In this sector, consumers are very tied to tradition."

But as Calvin Klein could attest, that's what people used to say about blue jeans.

Why Customers Eat Out

Reason	All Restaurants	Fast Foods Restaurants	Family Restaurants	'Atmosphere' Restaurants
Convenience	37.3	40.7	53.4	16.1
Enjoyment	23.4	5.9	23.0	46.0
Lack of Time	18.1	39.7	7.8	1.4
Celebration	6.9	.3	2.3	20.2
Traveling	2.4	2.5	2.9	1.7
Business Meeting	1.7	.9	1.6	2.8
Shopping	1.7	3.1	1.6	.0
Other/No Response	8.5	6.9	7.4	11.8

Source: National Restaurant Association.

INDEX TO ADVERTISING

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Private Label Share Down

A Gallup study commissioned by the Private Label Manufacturers Association indicates that private labels are considered important to customers with three or four surveyed stating that they are a major factor in selecting a supermarket.

On the other hand, the latest report by Selling-Areas Marketing, Inc. (SAMI), for the 12-week period ending November 11, indicates that private labels lost some share, and a SAMI official predicts that with an improved economy, this trend might be expected to continue.

What Customers Look For

According to the Gallup survey of 1,104 primary shoppers, customers looked for fast, accurate checkouts and low prices when selecting a supermarket, with 83% rating those factors as most important.

But, private labels rank close behind with 73% and 60% respectively, stating that quality and variety of store brands is of paramount importance. Ninety-one percent considered quality highly important in their decision to buy a national brand, 80% a store brand.

These statistics were revealed in a special news section in *Supermarket News* entitled, "Focus on House Brands." The Private Label Manufacturers Association represents 430 companies which manufacture private label products.

The primary reason for the decrease in private-label share is the lessening of inflation, said Allen Miller, SAMI Vice President, "I believe it is not the recession of 1979-81, it is the inflation rate that lead consumers to be very conscious of pricing."

Concern for Quality

Ironically, Miller noted, private label is purchased most heavily by highly educated, higher-income consumers who are less likely to be affected by recession. "People who can't afford it, don't trust its quality," he said. They are afraid that if they buy a private label item, their families may not like it and they would have to throw it away.

NPA 80th Annual Meeting
Hotel del Coronado
July 8-12, 1984

1984 Thomas Grocery Magazine

Floral department products under eight new categories and 43 new candy categories highlight the thousands of changes made in the 1984 Thomas Grocery Register now available.

The three-volume annual directory with 3,500 pages is the industry's largest. It has more than 60,000 companies and 174,00 listings. The annual update has resulted in altering the status of more than 3,000 firms who have either merged, changed name, moved or gone out of business.

In addition, almost 40% of the 60,000 firms had changes made in their listings ranging from new buyers, officers, number or stores owned or serviced, to annual sales for chains and wholesalers; new product lines sold by brokers; new imports and exports and new products by manufacturers of food and non-food products as well as by manufacturers of industry related equipment, supplies and machinery. More than 400 food manufacturers were added.

Business Forecasts

The second annual Food Marketers' Handbook, a 36-page adjunct to the directory, includes business forecasts by spokesman for 12 leading trade associations. The executives are buoyed by the economic turnaround in 1983, and they see their industry as mature and experienced with the ability to work out problems as they arise whether caused by the economy, weather or world condition. Business in 1984 opened on a high note and is expected to stay on key into 1985.

The Handbook has increased its coverage of trade association convention dates and locations and carries updated Department of Agriculture statistics on farm output, prices, consumer expenditure on food, exports and imports.

The three volume 1984 Thomas Grocery Register is $95, including postage and handling. Outside of U.S. and Canada the price is $135, air postage included. The Food Marketers' Handbook is free to subscribers. Write to Thomas Publishing Co., Dept. H-1, One Penn Plaza, New York, NY 10119.

New Book

Antimicrobials in Foods (Food Science Series, Vol. 10). Edited by Alfred Larry Branen and P. Michael Davidson, 1983, 480 pages, bound, illustraded, $69.75 (Price is 20% higher outside the U.S. and Canada. Subject to change without notice).

In this era of the supermarket and packaged foods, shelf-life and the antimicrobials used to extend shelf-life have become primary concern of food processors.

Antimicrobials in Foods combines coverage of compounds currently approved as food additives and naturally occurring antimicrobials. Each chapter, written by prominent authorities provides the basis for informed evaluation of the risks and benefits of using antimicrobials in food sysems.

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