

**THE
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JOURNAL**

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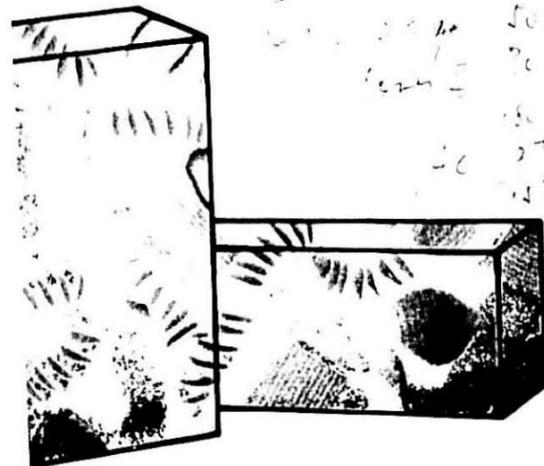
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Ribbon Cutting for New National Headquarters

The National Pasta Association Board of Directors assembled in Washington, D.C. to officially mark the opening of the new national headquarters and to attend a specially arranged briefing at the White House.

Following ribbon cutting ceremonies at the new offices, a reception for officials from the Administration, regulatory agencies and allied associations was held at the Four Seasons Hotel to celebrate the grand opening. Each member of Congress with a pasta plant in his or her district was invited.

"The opening of these offices in Washington represents a significant time for the NPA and marks the end of a transition period that began back in 1980 when the Board and members of the Association defined the goals and objectives of the Association for operation in the 1980s," said Chairman Joseph P. Viviano.

He continued, "These offices belong to all members of the Association and are open to serve the needs of members both large and small, both manufacturing and associate. It is an honor for me to be head of the Board of

Directors to oversee this transition to a new chapter in our proud 80-year history.

Earlier that day, Thursday, May 10th, the Board had an exclusive briefing at the White House. Mary Jo Jacobs, Special Assistant to the President for Public Liaison, conducted the briefing and was assisted by Edwin Dale, Associate Director of the Office of Management and Budget, an assistant to David Stockman, for remarks on the fiscal 1985 budget and budget deficits. Leonie Michibald, Associate General Counsel, Office of the U.S. Trade Representative, brought the Board up to date on the Section 301 pasta dispute with the European Community and reported on the bilateral negotiations that are currently underway in Geneva regarding a subsidy reduction.

Colonel Larry Tracy, Military Advisor for Latin America and the Caribbean at the U.S. Department of State reviewed the importance of the Central American region to the United States in light of President Reagan's speech on Central America the previous night.

The White House briefing was held in the historic Indian Treaty Room, The Section 301 Trade Case, the econ-

Ribbon Cutting

omy, food safety, and the 1984 Farm Bill were on the agenda.

The following morning saw Senator Mark Andrews of North Dakota open the session on Washington politics. Dr. Charles Benbrook, Executive Director, Board on Agriculture, National Academy of Science, spoke on food safety. His remarks are on page 1. Michael Farren, U.S. Department of Commerce commented on incentives for U.S. business to export.

80th Annual Meeting Agenda Announced

The National Pasta Association meets at Del Coronado Hotel, Coronado, California July 8-11, 1984.

The opening evening will be a Bahia California Beach Party Welcome at the Del Beach, 6:30 p.m. July 8.

July 9

Monday's sessions begin with Table Top Exhibits in the Ball Room. Chairman Joseph P. Viviano will report on the state of the industry. Dr. Christine Aguiar will discuss "Lake Ten Health and Exercise Break." Elinor Ehrman of Burson-Marsteller reports on Pasta Promotion Program. Golf and Tennis scheduled for the afternoon.

July 10

Tuesday's activities begin with Committee Council Breakfast Meetings. Business session features George Lazarus, Chicago Tribune and Adweek columnist on "The Demise of Marketing 101." Steven Koff, President of Southern California Grocers Association comments on "Retail Issues, Challenges and Opportunities." Janet Johansen, Consumer Panel Manager,



Board Meets in Indian Treaty Room



Ted Settanny and Tony Gioia listen intently.



Edith Hagan, Paul Vermylen, Joe Viviano.



Jim and Verona Jenkins of the White House staff

THE STATE OF THE INDUSTRY

by Joseph P. Viviano, Chairman of the Board,
at the N.P.A. Winter Meeting



Joseph P. Viviano

What has happened in the pasta industry? How did industry sales in 1983? Lonnage was up 27% compared to 1982 when the gain was 5%, but either of those gains is an average for all dry grocery products as a group which gained only 1% both years. Over the past year, the growth of dry pasta has been about triple that of all dry grocery food products in the supermarket as a group.

The decline of regular private label pasta since 1980 continued in 1983. Its share peaked in the summer of 1982 and appears to have lost its luster but generic pasta is still a big

factor at about 75% of industry pounds.

How about important brands? One or more imports have measurable volume in 31 of the 48 SAME markets. Measurement of warehouse movements as of a few months ago.

The total industry sold about 1.8 million more cases than a year ago. With a share of only 1.6%, imports accounted for more than one third of the new cases. Their lonnage gained at a rate of 97% while domestic brands — that is in this room as a group — gained at a rate of 2%. I tracked the industry growth rate and cost share.

I guess you know why, in the strength of 1983 results are seeking their chops and nibbling a satisfactory belly don't you. The import brands that's who? Why doesn't somebody do something about those import brands?

Somebody Is Doing Something

Somebody is doing something. The National Pasta Association.

As you know, the Association's challenge of the European Community's subsidy program through a petition to the GATT (General Agreement on Tariffs and Trade) produced the first victory for the U.S. in international trade cases since 1969.

In politics and government, victory is not always what it may seem. The task now is to get this international

issue resolved. The U.S. has a strong position in this regard. We are going to continue to work for a resolution of this issue.

Be the first to do it. The U.S. has a strong position in this regard. We are going to continue to work for a resolution of this issue.

Newly appointed staff members and their families were invited to Washington to join the N.P.A. staff and several members of our board of directors. Our most recent trips were to meet at an assistant to President Reagan in the White House, the United States of America, the United States of State, and of course, the U.S. Food & Drug Administration. Many thanks to our members for their support.

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Annual Meeting Agenda

Better Homes & Gardens Magazine presents "Consumers Perspective on Pasta." Robert T. Johnson, Associate Editor, Milling & Baking News tells about "Yesterday, Today and Tomorrow — Years in the Pasta Industry."

July 11

Wednesday, the final day starts with Chairman's Breakfast for Suppliers. Business session is a Team seminar led by Victor Pineda, President of Adizes Institute. Meetings to elect officers in the afternoon to be announced at the July Gala in the evening. Dinner, installation of officers, and dancing.



Elinor Ehrman, Donna Gioia, Steve Brady.



Guests with Joe Lichtenberg and Joe Viviano.

ington scene.

What is happening at the core of the matter? The U.S. Trade Representative has accepted our case. The E.C. is attempting to block approval of the U.S.'s victory by the full Subsidies Code Committee of GATT. Bilateral talks between the U.S. and the E.C. are continuing. Thus far, the E.C. has offered to reduce its present subsidy (which it claims is 7.5¢ per lb.) by 15%, and upped it to 25%. The U.S. has rejected this offer and made a counter proposal. There has been no reply as yet.

The pasta case represents an important victory for the U.S.T.R. in its overall dealing with the E.C. on trade issues, and our government does not seem inclined to give up this victory easily. It is likely that the pasta controversy will be resolved eventually within the context of a number of pending agricultural trade issues with the E.C. if N.P.A. and its members continue to press for relief.

Where Does Industry Stand?

Where does our pasta industry stand in the spring of 1984? What were the Association's major objectives in 1983 and what was our progress? What is the future of the National Pasta Association?

I'm going to address those questions as I try to summarize for you the state of our industry as of March 12, 1984.

In 1983, five manufacturers were sold — including two of the top three in terms of sales volume. We've had some busy years in which several mergers were announced — but 1983 was a world record. The firms who were sold were Paramount, D'Amico, La Rosa, Mueller and Ronzoni.

If you were to ask me, I would say without hesitation that certainly there will be more, many more, just like there have been many in the past. We are even to the point that some manufacturers are being bought and sold a second time.

Nineteen eighty-three was probably one of the most competitive years, if not the most competitive year, in the industry's long history. Some major new plants and additions began operation. Imports made astonishing share gains. For most of the manufacturers in the industry, my guess is that it was not all that great a year.

Perhaps it is even more accurate to say that the world record in acquisitions for our industry last year merely

acknowledges that we indeed have passed from the consolidation phase to the super-consolidation phase of the industry's history.

On July 14, 1982, at the Broadmoor, I told you that the future of the Association is at some form of crossroads brought about by new ownership, new points of view, new priorities, a natural evolution within the industry. Even the economy has contributed to these conditions. That crossroads, or critical period in our industry's history, will span several years; 1984 certainly confirmed that.

And the principal characteristic of this crossroads period is change!

Would you like a quick perspective on the kind of change involved? In 1948, just about the time when I first was introduced to the National Macaroni Manufacturers Association, there were 250 manufacturer members. Today there are 47!

It is going to be exciting and fun for the good, disappointing and unsuccessful for the mediocre. It will take even greater professionalism than any of the companies in this industry exhibit today to be successful in the pasta industry of tomorrow. If you doubt that statement, all you have to do is look to history — your own history — the history of your operation, the kind of progress you had to make to get where you are today. Would you be able to operate today with the kind of systems that you had 10 years ago?

Some of you are so new to the industry that you do not have the capacity to look very far back on pasta history. That is simply one additional observation that underlines the degree of change in the industry.

Professionalism Needed

If to survive we all must have more professional pasta manufacturer organizations, what kind of pasta association are we going to require? A very professional National Pasta Association. That conclusion requires no genius, merely simple logic.

As a matter of fact, perhaps it would make more sense to reverse that perspective. If we are going to have an industry full of successful pasta manufacturers, then maybe what we need first is a very professional association.

What is the role of our association in these critical times? It is to lead, to direct, to be on the cutting edge of change.

We've made some substantial changes in the N.P.A. over the past few years. We've moved the office to Washington, the nerve center of our government. We've completed a strategic plan and are well into implementation. And we have a number of people, probably more than at any time in the recent past, working cohesively toward these objectives.

For those caught up in the day-to-day turmoil of the pasta business, it is too easy to lose sight of the single reason for the association's existence: "The National Pasta Association can do for you what it is impossible for you to do individually — build consumer acceptance and consumption." In 1983 alone, the association's product promotion program generated 1.6 billion impressions favorable to the product we sell. It is not economic for you to do that on your own. The association marshaled the resources of its membership and focused them against the unfair competition from imports.

The association also promotes our products against carbohydrate competition, provides educational forums for technical disciplines, resists unwarranted intrusion and regulation by government, improves the quality and availability of our raw materials, addresses consumer and governmental issues such as nutrition, labeling, packaging, etc., with one strong, unified voice; provides meaningful statistics and measurements of the industry's impact, importance and progress; develops uniform product standards, and provides a centralized source of industry information for government, for members, for growers, millers, suppliers and anyone else. And that just hits the highlights.

Somewhere near the top of the list we should acknowledge that an association provides a forum. Where else can you meet all your suppliers and your competitors in a single tripe? This forum provides the means for all of us to have a meaningful dialogue on industry events and to take appropriate action as a group and as an individual organization.

In the critical super-consolidation phase of our industry, this association is more important to its members now and in the future than at any time in its history. I hope everyone is perceptive enough to realize and appreciate that fact. There is nothing at stake except the health of your business.

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FOOD SAFETY: SOME POLICY ISSUES AND OPTIONS FOR 1984

Remarks Delivered by Dr. Charles M. Benbrook, Executive Director,
Board on Agriculture, National Academy of Sciences
in White House Briefing to N.P.A. Board, May 11, 1984

My comments are based primarily on my experiences as the staff director of the Department Operations, Research, and Foreign Agriculture Subcommittee of the House Committee on Agriculture. This subcommittee, fondly known in pesticide regulation circles as the DORFA subcommittee, exercises legislative and oversight jurisdiction over the Federal Insecticide, Fungicide and Rodenticide Act, or FIFRA. After working for about three years with the subcommittee, starting in 1980, I left the Hill in January to assume my current position as Executive Director of the Board on Agriculture within the National Academy of Sciences. My remarks reflect my own thinking, and do not represent the position or findings of the Board on Agriculture or the NAS.

Food safety is indeed a key issue which belongs on, but will probably not reach, the political agenda during this election year. The underlying issues are generally viewed as too explosive and complex, even for issue-oriented candidates. Perhaps this conference will help encourage the major candidates to share their views with the public on these matters. Such a debate would be particularly appropriate in 1984 because food safety issues are caught up in a powerful stream of events in both the legislative and executive branches which could easily culminate in the adoption of important legislative changes in our food safety laws. Even if legislation is not passed, we can expect considerable change in how these laws are administered, and interpreted by regulatory agencies.

I predict that there will be a concerted effort to reach agreement on amendments to food safety laws during the first session of the 99th Congress. The likelihood of congressional action will increase appreciably if some court ruling undermines or vacates one or more of the recent, controversial administrative interpretations of the Delaney Clause, or other important provisions of law. Legislation will have a fighting chance to pass when a ma-

majority of members, including a few key committee chairmen, realize that everyone's interests are best served by resolving as effectively as possible the widely recognized flaws in existing laws.

Several people have speculated that the recent flurry of press attention on the pesticide ethylene dibromide, or EDB, will lead to a broader and sustained appraisal of food safety issues. Some people feel such attention is misplaced and will only fuel groundless public anxiety, while others think it's about time people took these issues seriously. Greater public understanding of food safety issues and options should, in any event, help galvanize congressional action. I have detected a growing sense of frustration and concern among protagonists on all the various sides of the issue which perhaps could facilitate a less than normally adversarial evaluation toward compromise. Some people also believe it is possible that baseball will return to D.C. this summer.

History is richly endowed with failed efforts to amend food safety laws. I am addressing primarily the Federal Food, Drug, and Cosmetic Act (FDCA) and the FIFRA statute. I experienced two such failed cycles in my three years on Capitol Hill even though a good faith effort was made by all parties to structure a bipartisan set of amendments to improve the FIFRA statute. Everyone recognizes it is relatively easy to stall controversial legislation. Once every few decades or so, however, the need for change becomes so compelling that legislative activity progresses as if these were no tomorrow. This happened in 1981 with the budget and tax cut bills, and in the early 1970s with environmental legislation. I think it is going to happen soon in the food safety area, resulting in major amendments to both the FDCA and FIFRA statutes.

The over-riding reality is that the food safety laws as currently administered are fraught with inconsistencies, contradictions, inefficient requirements, and affronts to common sense. Fashion-

ing creative ways to undermine the Delaney Clause has become a growth center within the legal profession. Ad hoc strategies adopted to resolve individual regulatory dilemmas have produced over the years a patchwork of policies. Food additives and pesticides are regulated differently according to when they were first introduced, as if, like wine, they improve with age. Different classes of compounds are subjected to varying degrees of scrutiny, and are regulated in accordance with different standards. Taken together, this body of law is itself a hazard to public health and is, moreover, inequitable and inefficient in its impact on the regulated community.

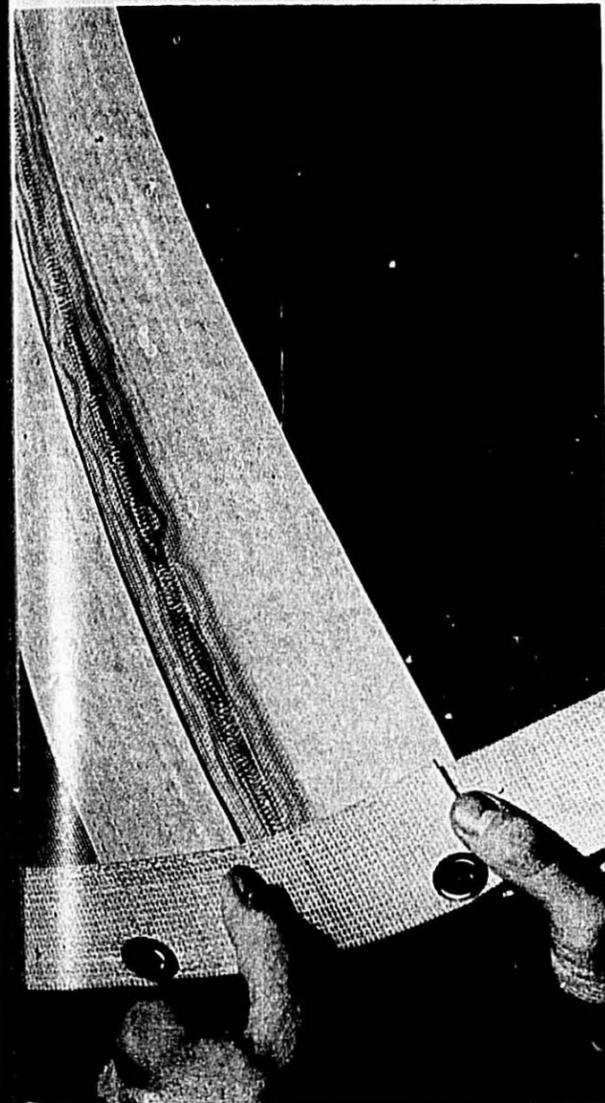
Someday soon a disgruntled corporation, or a concerned citizens' group, or a contradictory set of state regulatory actions will force some kind of hopefully constructive resolution of the underlying issues. There is a growing sense that the status quo is unstable and highly volatile. While food safety issues are exceedingly complex, both scientifically and politically, the overwhelming consensus is that changes are needed in the laws. I agree with this view, and believe that all segments of society would benefit from a carefully structured set of amendments to the FDCA and FIFRA. I have yet to see, however, any really encouraging new approaches that offer a realistic hope for compromise and consensus.

Americans are deeply concerned about the threat of nuclear war, and hence nuclear arms control issues are high on everyone's political agenda. I would suggest that food safety issues also belong on the agenda for many of the same reasons. Our lifestyles are changing in many ways as we strive for better health and physical fitness. Public concern seems to grow when health risks are involuntary and largely invisible. We all also seem particularly sensitive when the risks we encounter in life could indiscriminately and suddenly impact our families and friends. The response of some corporate officials and scientists to these public fears

(Continued on page 10)

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Food Safety

(Continued from page 8)

is that there is no such thing as a zero risk society. This is true, of course, but zero risk is clearly desirable, and is, in fact, the goal endorsed by Congress in several regulatory statutes. In the cost-benefit, or risk-benefit statutes, regulatory actions aspiring toward zero are truncated by economic and other social concerns. We all recognize that a zero risk society is unattainable, but reducing and when possible, eliminating involuntary health risks remains a sound goal whether the risk is posed by nuclear bombs, excessive reliance on x-rays, or chemical contaminants in food.

Four Fallacies, A Lesson, and an Emerging Issue

I want to briefly discuss some of the basic lessons and fallacies one encounters in the public discussion of food safety issues. The ethylene dibromide case has substantially raised the public's understanding of the many sorts of difficulties the Environmental Protection Agency (EPA) can encounter in carrying out its mandate to protect the public health. Some people predict that the debate instigated by the EDB case will have a far more lasting and significant impact on the public's health than the elimination of EDB itself from the food supply.

A Lesson. It takes a great deal of public concern, inevitably brought about in part because of considerable media coverage, to create the political pressure needed to compel the EPA to take controversial regulatory actions. The pressure is needed not because the EPA is bashful or unconcerned about the environment, but because the EPA operates within a highly political arena with a rather limited capability to overcome entrenched institutional and political opposition.

Let the record clearly show that political pressures outside of EPA's pesticide office were the primary cause of six plus years' delay in suspending EDB. Throughout the last decade, involuntary pesticide suspensions and cancellations have been stubbornly resisted by chemical manufacturers and some user groups. Furthermore, Congress has periodically punished the EPA for unpopular actions by building into the regulatory process new hurdles for EPA to pass through or over. These procedural changes have

strengthened the hand of those within the Congress and U.S. Department of Agriculture trying to defend pesticides against regulation. Administrator Ruckelshaus has recently directed attention to the time-consuming, formal procedures governing pesticide suspensions and cancellations. He has suggested that amendments to FIFRA may be needed to provide the agency with regulatory options that are more efficient and less prone to political manipulation.

Fallacy 1. The eagerness of the press to pursue stories on pesticides and environmental health hazards will assure that any important health threat is thoroughly investigated and acted upon.

Wrong. The hazards of EDB were widely known and well documented for years before regulatory action was finally taken. There are simply too many chemicals in the environment, and too many unsuspected ways they behave in food, the air, or water to place too much faith in a diligent press corps. They can be counted on to occasionally, but not routinely, expose the failings of indecisive regulatory bureaucracies. Furthermore, the press and public simply cannot handle more than one "chemical of the month." Depending on your point of view, there are too many chemicals or not enough months.

Fallacy 2. A pesticide like EDB is "safe" if scientists can convince EPA and the rest of us that our health is not jeopardized by the grapefruit and pancakes we ate for breakfast this morning.

The philosophy underlying this statement has been seized upon in recent years by the EPA whenever it felt compelled to defend a relatively lax regulatory decision involving a pesticide known to pose substantial hazards. This fallacy makes sense on the surface. In a narrowly scientific sense, statements of this sort are indisputable. Some people, though, take the point another crucial step by arguing that because we will survive breakfast, we should relax and stop over-reacting to stories about the presence of chemicals like EDB in our food.

The problem with this reassuring train of thought is that people eat all sorts of foods and are routinely exposed to all sorts of chemicals in food, air, and water. People afflicted with chronic diseases are not made better

or appeased by scientific judgments to the effect that there is only a one in a million chance that exposure to chemical x, y, and z caused their illness.

Indeed, we are beginning to understand that the development of cancer in man is a multi-staged process which is generally brought about by a very specific combination of factors. We also are beginning to appreciate that relatively brief exposures to very low levels of genetically active chemicals like EDB can, if fact, play a critical role in setting off, or sustaining the development of human cancer.

For these reasons, it is a mistake to judge the advisability of regulatory actions through a marginalist approach to the assessment of human health risks. Such an approach is scientifically unsound and conceptually flawed. When asked about the additive and potential synergistic effects of pesticides, EPA officials respond that such effects are not routinely taken into account in risk assessment. In rare cases where a study has demonstrated such interactions, the agency may attempt to take them into account, although it does not have a policy or scientific guidelines on how this should be done.

Many of the pesticides and other chemicals to which we are exposed every day are closely related, and are known to cause comparable types of biological responses. I think careful, systematic attention should be given to the implications of this shortcoming in the way EPA and FDA characterize the risks posed by chemical in food. When asked what can and should be done to address the additivity of chemical contaminants, EPA officials generally contend that such a routine appraisal would be too costly, and that they are having enough trouble acting on known hazards associated with specific pesticides. Most of us would agree with at least the last part of the agency's response.

Fallacy 3. It does not make sense to regulate a chemical like EDB if a safe, available, registered alternative is also hazardous.

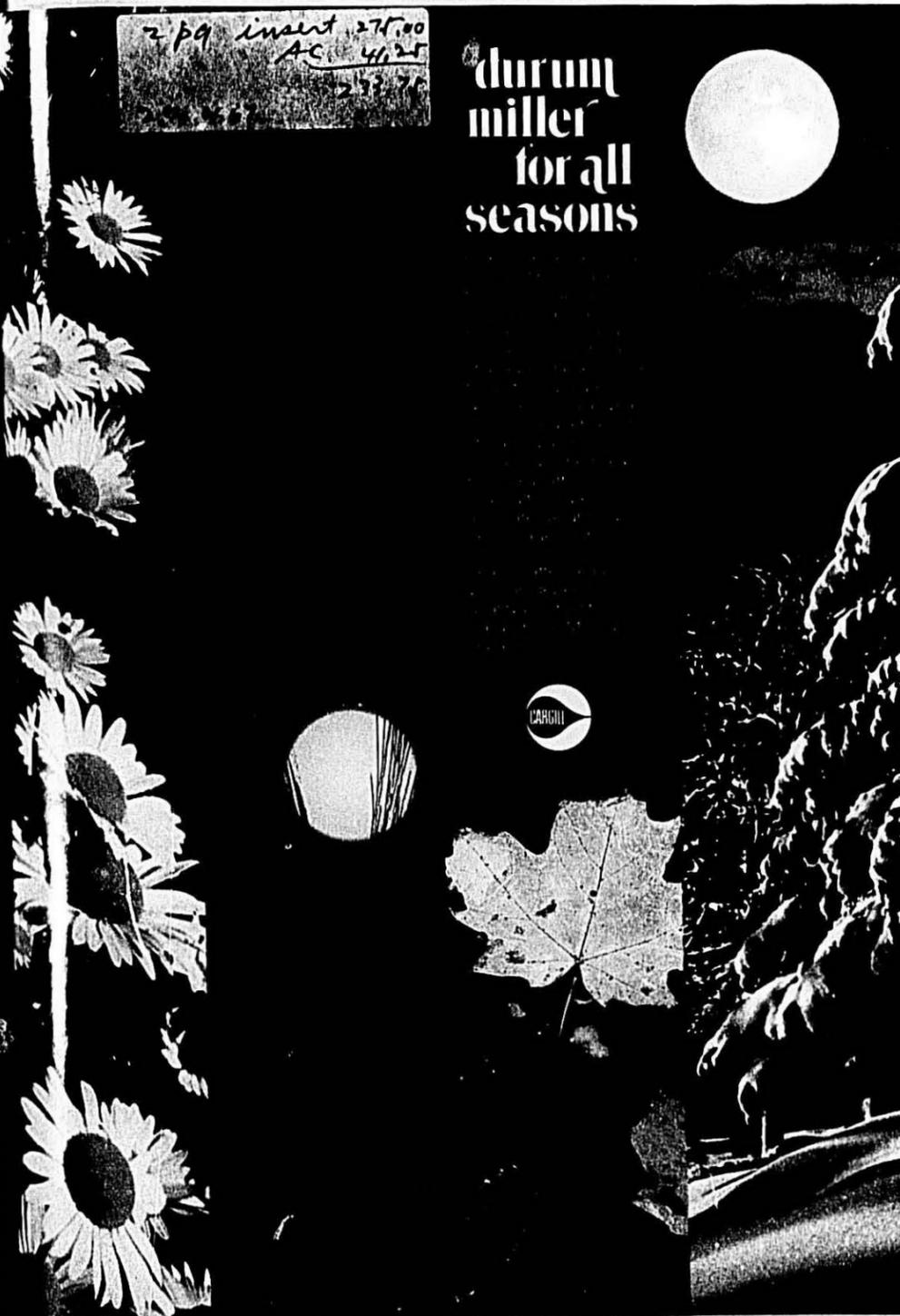
In a provocative editorial on March 14, 1984, entitled "Cancer, Cancer," the Wall Street Journal raised questions about the EPA's precipitous actions to suspend EDB in light of the finding that methyl bromide, an alternative to EDB for many uses, may be

(Continued on page 14)

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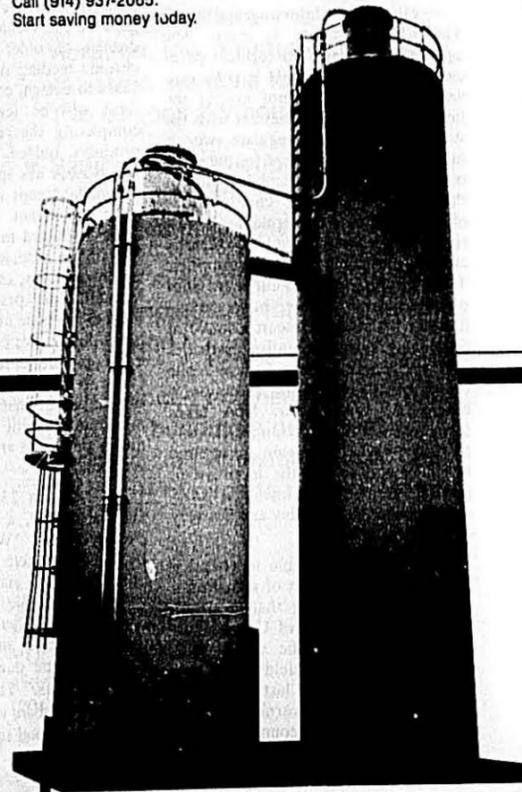


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Food Safety

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an oncogen even more potent than EDB. The Wall Street Journal is clearly not alone in focussing attention on the regulatory status of methyl bromide. This widely used compound is registered for many of the same troublesome post-harvest fumigation uses as EDB, and has recently been found in citrus pulp following fumigation. Less is known about the presence of methyl bromide in the food supply because it has not yet been subjected to the sort of intensive monitoring carried out recently on EDB. If serious doubts are raised about methyl bromide, the impact on the agricultural industry and public health could be much greater than we have just experienced with EDB. In California in 1982, some 7.9 pounds of methyl bromide were used for every pound of EDB. To further complicate matters, other registered alternatives for EDB and methyl bromide are also thought to pose substantial, but in most cases, poorly characterized health hazards.

So what's a regulatory agency to do? The FIFRA statute is clear. The agency is mandated to regulate pesticides, to reduce hazards if risks outweigh benefits. It is not against the law, or somehow inconsistent with the statute for EPA to regulate two or more chemicals registered for the same use. Indeed, the basic philosophy of the statute is to foster safer methods of pest control by regulating excessively hazardous pesticides, thereby creating new commercial opportunities. These opportunities, in turn, are supposed to act as incentives to private industry to conduct research aimed at developing safer alternative pesticides and pest control technologies. While the theory is sound, the execution is flawed. As long as the EPA takes seven years to regulate an EDB, only to restart the clock again for methyl bromide, and so on, the incentive to innovate through investments in product development is hollow and not very compelling.

It is almost impossible to attend a meeting on some aspect of agricultural policy without hearing that the ingenuity and productivity of U.S. agriculture is the envy of the world. Still, nearly every major pesticide regulatory action taken during the last decade has been resisted through warnings of crop failure and massive economic losses.

Fortunately, I know of no case where these warnings came to pass. It is also worth noting that recent applications of genetic engineering research techniques to crop and animal health protection needs are beginning to offer real promise for major practical breakthroughs. With new scientific possibilities on the horizon and burdensome surpluses handing over most major commodity markets, this would seem the best of times to re-evaluate the assumptions that are used in estimating the benefits side of the pesticide regulatory equation.

Fallacy 4. The EDB case is unique and exceptional.

Wrong. It is important to recognize that there are several dozen older pesticides in wide use that are likely to raise the same types of human health concerns as EDB once EPA gets around to thoroughly evaluating their safety with modern scientific methods. I would expect that only a few, perhaps up to a dozen, will raise such serious and widespread concerns as EDB. Still, it is unfortunate that EPA has not yet required pesticide registrants to fill the gaps in the toxicological database on dozens of older chemicals. Since a chronic feeding study takes some four years to design, conduct, and evaluate, there will be several years delay in completing the review of these older products. Indeed, the leisurely pace at which EPA has approached the task of filling data gaps has been one of the most significant, recurrent topics of criticism heard in congressional hearings on the pesticide program. You can not re-evaluate, or reregister, or regulate an older pesticide without data. Hence, the pace of the data-calling program determines how quickly the EPA can complete its review of older pesticides. While clearly an oversimplification, it can be said that older pesticides are innocent until proven guilty, while newer pesticides are guilty until proven innocent.

In a March 23, 1984 Wall Street Journal article, a Pillsbury Company executive said, "We fully expect that behind EDB there will be a number of other chemicals and pesticides that will get serious public attention." Another company official said, "The worst thing that can happen in this industry is to have someone question the safety of your products." The article concludes with a less than resounding endorsement of our food safety laws and regu-

latory programs. "(Concern over product safety) is why Pillsbury scientists are studying all the chemicals the company uses. It used to rely on federal approval in choosing pesticides, but now 'we've got to be knowledgeable enough to make our own judgments,' says one of the scientists."

There are likely to be more, not fewer cases like EDB. In addition, the types of chronic and acute health hazards raising serious concerns are likely to include other diseases in addition to cancer. Many scientists are particularly concerned about the potential for pesticides, food additives, and some natural food contaminants to cause allergic reactions, or subtle behavioral and learning difficulties in children. The science needed to evaluate these concerns is not well defined, but is rapidly evolving.

An Emerging Issue. The contamination of groundwater resources with pesticides is not a new, nor even necessarily a growing problem. It has been going on for decades. The big change has been in our diligence in monitoring groundwater for the presence of pesticides. As federal and state monitoring efforts expand, the human health consequences of groundwater contamination will come into better focus. As this occurs, EPA and/or the Congress will have to determine what actions are appropriate to prevent or control the dissipation of pesticides into groundwater.

Several critical policy issues related to the protection of groundwater are on the policy agenda. Chief among the issues is whether the EPA, as a matter of policy, sanction the presence of pesticides in groundwater establishing tolerances for pesticide in potable water. There is also considerable uncertainty over how EPA will deal with some of the more widespread cases of groundwater contamination, especially those involving agricultural areas where a series of pesticides have found their way into drinking water. The central valley of California and Hawaii have, as an example, had a great deal of trouble with soil injected nematicides reaching groundwater resources. Administrator Ruckelshaus suggested to the DOFRA subcommittee last fall that the agency may someday have to adopt generic pesticide cancellations in cases where EPA determines no currently available prod-

(Continued on page 16)

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Food Safety

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can be used without posing an unreasonable risk of groundwater contamination. EPA policy on these matters is very much in flux at this time, and will until after the election.

Food Safety Policy Issues and Options

If I were asked to moderate a debate on food safety issues in September between President Reagan and the Democratic nominee, I would include questions about legislative priorities and the Delaney Clause. I would ask about plans for regulatory reform initiatives, and for a review of the types of changes needed in federal cancer policy. I think it would also be important to ask about budgetary commitments to carry out the often costly science that underlies sound regulatory decision-making. The philosophy of each candidate regarding the proper role and responsibility of the federal government in assuring that our food is safe would also be worth examining.

I would ask each candidate if he will support the Administrator of EPA and the Commissioner of FDA when they determine that unpopular regulatory actions must be taken to protect the public health. I would follow up by asking what the President will do in response to congressional reaction in opposition to contentious actions.

I would ask how human health risks should be balanced against the economic impacts brought about by regulation. I would ask for the candidates' view on liability issues in an attempt to get at basic attitudes about who should bear the cost of compensating the victims of past exposures to chemicals. I would ask for opinions regarding the job the EPA has done in the last four years in preventing future environmental crises, in contrast to dealing with the chemical-of-the-mouth crisis.

I would ask President Reagan if he believes that the public's trust in the integrity of EPA has been restored. I would ask the Democratic nominee what his administration would do differently in running the EPA, with a special focus on acid rain, hazardous wastes, groundwater protection, and the pesticide program. I would ask President Reagan if he believes the regulatory reform agenda during the second term will be a lengthy one, and if so, what the priority initiatives will

be. I would ask the Democratic nominee how he will avoid, if elected, another disruptive swing in the regulatory pendulum. It could prove to be an interesting debate that would, in all likelihood, be carefully watched by the public.

I stated earlier my belief that changes in our basic food safety laws are needed and probably inevitable, perhaps as early as the first session of the next Congress. The key to breaking the legislative log-jam is for all the protagonists to recognize that the law simply is not working adequately. As a result, society is needlessly subjected to both excessive health risks and regulatory costs.

The Delaney Clause works in a relatively straight-forward, efficient fashion when applied to most new additives and pesticides, yet has absolutely no impact whatsoever on the majority of older products initially registered before 1958. Likewise, the Delaney Clause does not have any retroactive impact on new or old chemicals when they are tested after food additive tolerances have been initially approved. This large group of products includes dozens of major pesticide ingredients tested by Industrial Bio-Test laboratories during the late 1960s and early 1970s. This laboratory produced a series of negative cancer bio-assays which later were found to be invalid and scientifically fraudulent. Even so, the studies served the important purpose of getting these products into widespread commercial use without any hitches from the Delaney Clause. Almost ten years after the IBT scandal broke, EPA finally took action last summer to assure that new studies will be done on the chemicals tested by IBT that remain on the market. Four or five years down the road, a new generation of regulatory dilemmas will emerge if some of these new studies produce marked increases in the health risks associated with these pesticides.

There is also growing recognition that the Delaney Clause creates a subtle, but important regulatory catch-22, especially as it applies to the establishment of pesticide residue tolerances under section 409 of the FDCA. The EPA is authorized to suspend an old chemical like EDB if the risks associated with its continued use outweigh the benefits, taking into account the availability of other control alternatives. Yet, many promising new pesticides that are unequivocally safer and

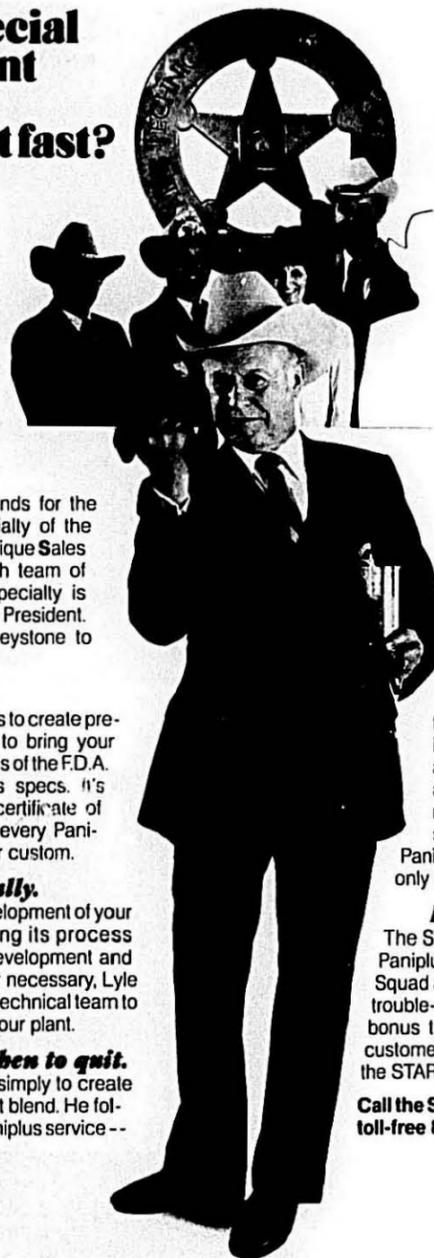
more efficacious than older products like EDB are denied tolerances, and hence registration because of the Delaney Clause. Accordingly, EPA finds itself unable to cancel some of the more nasty older products, even in the face of disturbing new data, because there are no available alternatives. As a result, our laws are actually prohibiting regulatory actions that would lead to unequivocal improvements in public health.

Resolving this regulatory catch-22 will be no simple matter. There are many special cases and a great deal of scientific uncertainty. Any changes in the laws will be exploited to the full extent possible by concerned constituencies, exposing the FDA and EPA to major new administrative and judicial pressures. These pressures, in turn, can divert considerable amounts of resources from the basic mission of the agencies. If the changes are poorly defined and purposefully somewhat open-ended, I predict that there will be a series of extremely contentious, protracted regulatory battles that could substantially alter our current food safety policies.

In terms of legislative solutions, I believe that little progress will be possible as long as the debate over amendments to the food safety laws focuses primarily on the definition of an acceptable, or unacceptable level of risk. Even if a general quantitative agreement could be reached on an acceptable level of risk, the science and art of quantitative risk assessment is not sufficiently advanced to apply such a standard without an inordinate amount of debate over analytic methods and cancer policy principles. We might as well accept that the basis for establishing such absolute standards will elude us for many years, if not decades.

Another strategy to overcome this problem deserves some thought. If science and politics are too muddled to establish a level of risk which is acceptable or "insignificant", perhaps we could instead structure regulatory strategies based on the more narrow goal of reducing risks below the levels associated with current chemical use patterns. One such strategy might involve an exception to the Delaney Clause whereby the use of a relatively less potent carcinogen would be permitted but only contingent upon the elimination through regulatory action of other, more hazardous carcinogens.

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Finished Product Testing Panel: Bill Kwo, Golden Grain; Tom Haas, Pillsbury; Frank Chan, Gooch Foods.

Raw Material Panel: Zizi Gibbs, C. F. Mueller; Dan Wendt, Pillsbury; Joe Dick, North Dakota University; Ken Crane, National Food Products.

Plant Operations Seminar

A record number of participants converged in Boston in early April to participate in the three-day exploration into the question of "manufacturing quality into pasta." More than 125 executives from the pasta industry were registered at the meeting held at the Hyatt Regency Cambridge in Boston.

"Spaghettille USA" Welcomes Pasta Manufacturers



Joseph Pellegrino greets group at lunch.



Master of Ceremonies Al Katskee with Seminar Chairman Marco Bonne.



Joseph Pellegrino leads plant tour.



Working groups held round-table discussions.



Bill Viviano, Joe Lichtenberg, Joseph P. Pellegrino.



Joe Pellegrino (in white coat) leads tour.

The state-of-the-art Prince manufacturing facility in nearby Lowell, Massachusetts was ready for a thorough inspection by participants. It was obvious that Prince employees spent a lot of time and effort preparing for the visit. The plant was a showcase of modern pasta making technology, and the spirit of the employee group who operate the facility demonstrated the real heart and soul of the operation by their warm reception and willing response to questions.

Following an extensive tour of the pasta manufacturing facility, the group was treated to a special luncheon in the famous Prince Grotto Restaurant. Then side trips were taken to the Prince Packaging and Prince Engineering Division followed by a tour of the new durum mill.

At the mill in Ayer, Massachusetts, heat will be brought in by unit trains made up of 60 to 80 cars or 6,000 to 8,000 tons and will unload at the rate of 660 tons per hour. There

are 11 grain storage tanks 120 feet high that will hold up to 12,000 tons of wheat. The production capability will be 600,000 pounds of semolina per 24 hours. The mill is expected to open sometime this summer.

Alan Pascale, Vice President and General Manager of the San Giorgio-Skinner Omaha plant, gave a marketing overview and challenged each production executive to examine their method of achieving the final goal—quality pasta.

Four panels of industry experts were each given an hour and a half to examine how production and marketing goals relate and depend on each other. There was a raw material, mixing/extrusion, drying and finished product testing panel. That program took the entire day and sparked lively discussions continuing late into the afternoon. The program was capped off with a seminar by noted management

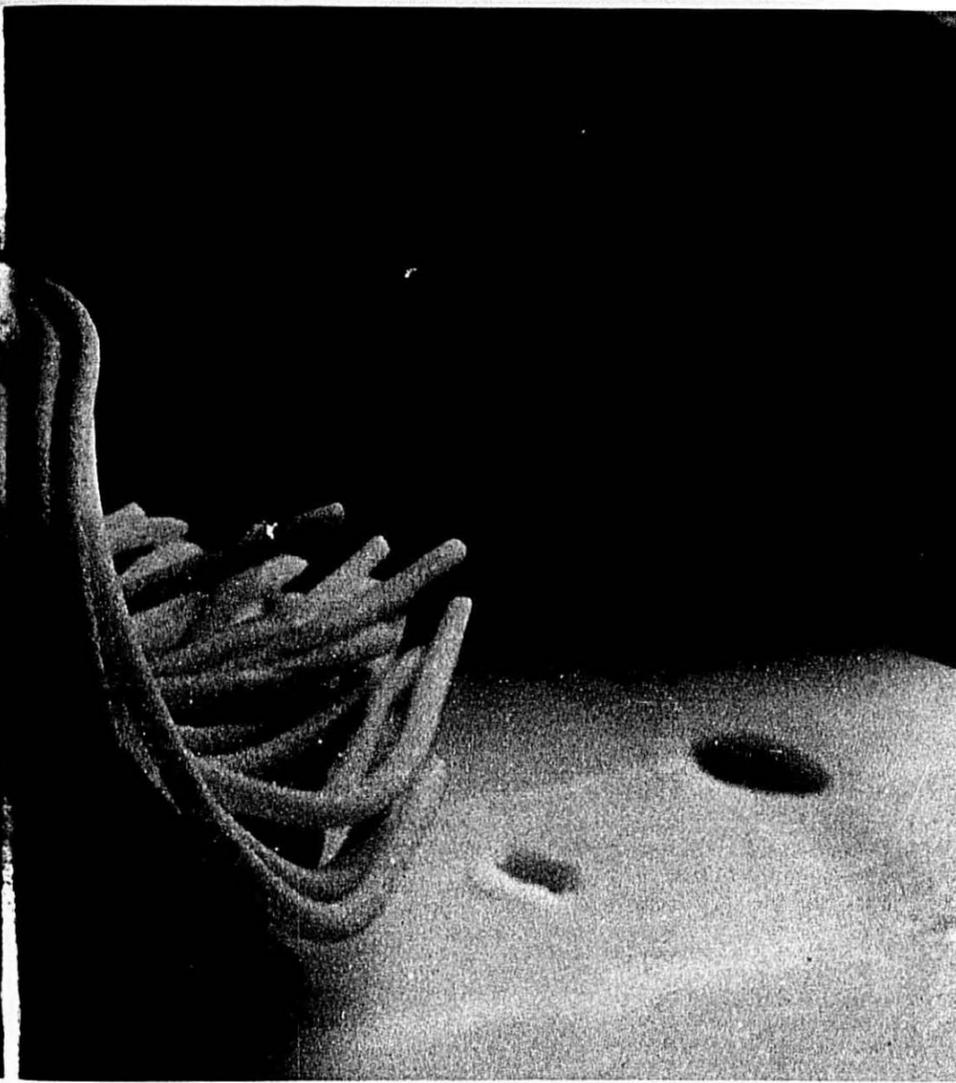
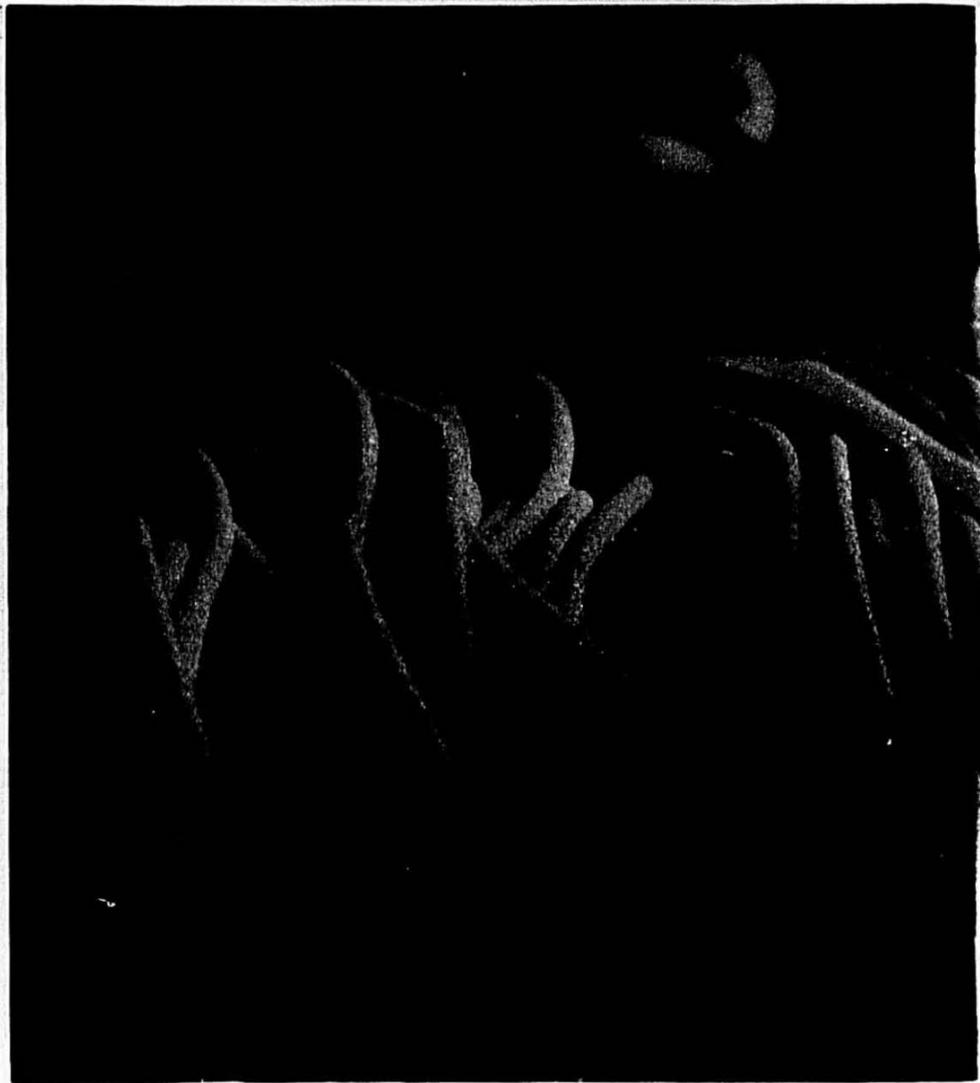
consultant Dr. Steve Falken, "Understanding and Managing Change."

"The Committee was gratified that there was such a high degree of interest in the seminar and was even more encouraged by the active participation of those who were present. This is the third consecutive year of increased attendance at these seminars and demonstrates the need and value of a good educational exchange of industry executives," said Marco Bonne, C. F. Mueller / Best Foods, Committee Chairman. The Committee responsible for the seminar includes, Marco Bonne, C. F. Mueller Best Foods; Charles Hoskins, Hoskins Company; Richard Gioia, Gioia Macaroni; Al Katskee, Microdry Corporation; Ken Kwiat, San Giorgio-Skinner; William Ogburn, Delmonico Foods; Richard Reilly, Thomas J. Lipton; Jerome Tujague, National Foods Products; Carl Tully, The Pillsbury Company; and John William, Western Globe Products.



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Marketing Goals vs Production Goals

by Alan Pascale, V.P. Planning—General Manager, Omaha, San Giorgio-Skinner, Inc., at the N.P.A. Plant Seminar



Alan Pascale

What I will *not* be talking about are the technicalities of pasta production. What I *will* be talking about are all of those things which *impact* upon the technicalities of producing pasta.

Not the *how*—But the *why*.
What I hope to do for you this morning is to paint a broad picture—a backdrop for today's technical discussions—so that all of us can understand more clearly where plant management fits in this broad picture, in an industry rampant in change.

I'll be talking about—

- Production vs. Marketing.
- How they *relate* to each other—or *don't* relate.
- What the most important element is in our businesses.
- The vast metamorphosis, the big change, taking place in our industry and how it affects you in plant management—whether you realize it or not.
- How you *measure* quality. What is it? Everybody talks about it, says they want it—but what is the precise definition of Quality?
- And finally—once you know the exact quality you want to produce, how do you go about getting it in your plant?

Imagine the following four separate scenes back home in your plant. Put yourself in the familiar role:

- The Marketing Vice President is terribly upset with the service

level and is berating the shipping manager and plant manager.

- The plant manager complains to Sales and Marketing that the case sales forecast compared to actual is either too high or too low—by a damn long shot—and how is anybody supposed to know how much to make of what, and how much inventory is needed.
- The Director of Sales is delivering a Royal chewing-out of the production people because the first shipment to the big new customer contained primarily delayed checked product—or maybe the color is lousy.
- The production people want to know what you expect when lead time is half what we need and demand this month has not only exceeded forecast, but capacity.

Does any of that sound familiar?

If it doesn't, this must be your maiden year in the pasta business.

At San Giorgio-Skinner, the Hershey Pasta Division, we certainly have had discussions of that general nature. I'm sure you have too—more than once.

Yes, sometimes there is a *wall* between the plant and the office, or production and sales. It's pretty common. Sometimes you find little *dialogue*—and *less* love.

Certainly it is not limited to the pasta business. It cuts across most industries.

I know that many of you have spent your entire careers in the pasta industry, and very possibly most or all or it on the plant side.

My own career does not fall neatly into a narrow track. During and after graduation from college I was a news editor in the newspaper business. Believe me, it, too, has a history of the production side vs. the news and advertising side.

For the next 14 years, I was with a large advertising agency and was exposed to many industries. I observed varying versions of the eternal argument between production and sales.

For example, in the insurance business there is friction between the underwriters who essentially "manufacture" the policy, and the salesmen, who must sell the product while dancing around the *limiting clauses, exceptions and deductibles*. The salesmen sometimes feel their interests cross those of the claim adjusters, who in turn have to content with the poor risks the salesmen have sold in the first place.

Sometimes we focus on the issues of *Contention* between production and sales to such *degree* that we lose sight of two important facts:

- The divergence of these disciplines is inescapable. Even more important is fact No. 2:
- They are completely *useless* without each other.

That seems so self-evident. *And yet we so seldom take the time to reflect on it.* But today is the kind of occasion that is very appropriate for just such reflections.

I've been in the pasta business for 20 years—in charge of marketing, advertising, sales. From there I moved up to planning and development.

During most of those 20 years, when I participated in those discussions between plant vs. marketing, I was speaking from the marketing-sales position. Mickey Skinner was running the plant most of that time.

Mickey was named President of the Hershey Pasta Division—San Giorgio-Omaha he said, "By the way, Alan, we're going to need someone to run the plant—and that's you."

I said, "Mickey—what did I ever do to you?"

Now the truth is I really *could not* say that, although ever so briefly the thought flashed through my mind, evidently the result of surprise smothering emotion.

And he said, "Alan, you'll do a fine job—and besides, think of the opportunity it gives you to see how it feels on the other side of the fence."

Skinner—late last year. Before he left I don't think he means it—but he says it often.

In truth, I already knew how it felt on the other side of the fence—at least to a degree.

I have retained my planning responsibility for our Division and I still direct all military sales for the Division. So now, incidentally, I'm occupying both side of the fence—plant management and sales—*simultaneously*. Consequently, I can sit in my office *alone* and have some dandy arguments with myself.

With planning, for a number of years I have been forced to mount a ladder that straddles the fence and to consider both disciplines, to assure that the two sides work in concert and towards a common objective.

The Common Objective

That is really the starting point—the common objective.

Production and sales, despite the difficulty of working harmoniously because of the conflicts inherent in their roles, meet as an indivisible one—as a single unit—at the point of purchase, when the consumer selects the product.

One of the first things I did as a new Manufacturing Vice President last December was to solicit from the managers in the plant their written views on a few key questions. I was interested in their attitudes and orientation.

Two of the questions were:

- Who or what is the most important element in our business?
- Who is the one above all others who determines your job security—whether you have a job to come to each day?

The enlightened answer to both of these questions is: *The consumer*. Without the consumer, and without the consumer buying your product, you have no job, whether production or sales.

There may be marketing goals and production goals, but in the end they are one and the same: To satisfy the customer.

If your orientation is to win the argument against sales because it is your argument against them—you are dead wrong!

If your marketing and sales people are concerned primarily with winning against you or shaming the plant because it's against you—they are dead wrong!

Your argument and sales' argument—if there is to be one—is against the consumer, not with each other, because she is going to decide who is really right or wrong.

The next time you are in a confrontation like that, with marketing and sales, try to see if the consumer has a position—and if she does, that's your main concern.

What Does the End User Want?

What does the end user want? Let's recognize first that we have *two* customers or end users: The trade and the consumer.

The consumer: That's a gas-powered, computer-driven bundle of prejudice and resentment.

The trade: That's a collective noun referring to the buying agent for the bundle of prejudice.

Those descriptions were offered to me by a highly intelligent, very successful marketing man I admire, who obviously observes with a jaundiced, but nonetheless experienced eye. Within a certain frame of reference, I pretty much accept those definitions.

You do have to sell to the trade, the buying agent is price sensitive.

Pasta as a category is typified by:

- A. High brand loyalty and/or brand awareness.
- B. Low consumer involvement.

As a result, generally a competitor cannot take your consumer from you, but you can lose your consumer with an extended period of poor quality.

Perhaps you've heard the terms "Production-oriented Company" and "Marketing-oriented Company." Which kind of company do you think you work for? What do those terms imply to you?

I suppose people have their own versions of what those terms mean, but essentially they imply the orientation or the direction or the type of organization a company adopts for its operation. It has to do with the type of decisions and thought processes that a company makes and uses.

A production-oriented company is thinking in terms of how to facilitate the production process . . . how to do something easier, cheaper, faster, simpler—with less trouble or hassle for the plant—so that costs are low and efficiency is high. Then management turns to sales and says: "Here, this is what we've got, this wonderful product. Now, go out and sell it."

Sounds great, doesn't it?

It's sounding better and better to me every week as I become more and

more involved in the intricacies of plant management. And anyway, isn't that the same as being a low-cost producer, which should be the goal of every red-blooded plant in America?

No, it is not necessarily the same as being a low-cost producer. And despite my responsibilities in plant management, I personally don't think I would want to work for a so-called production-oriented company.

What, then, is a marketing-oriented company? Let me explain it this way:

A marketing-oriented company addresses the more essential, the more critical questions, and addresses them first. The first question is not: How can we do it simpler or easier for us—or even cheaper. The first question is:

"What does the consumer want?"

Once a company feels it has answered that question, then it organizes its entire operation so as to give the consumer what she wants, to filling those consumer needs as perceived by the company.

That's a far more intelligent approach for the long term, because if you don't give the consumer what she wants, she'll buy somebody else's spaghetti that *does* satisfy her wants, and in the end you might be out of business.

There is a major difference between a production-oriented company and a marketing-oriented company that may be difficult even for the people in a given business to see or understand. But it is there. And the chances of long-term growth and success are strongly in favor of the marketing-oriented company.

The Historical Perspective

This might be a good place to stop for a moment and consider what is happening in this industry of ours. Very definitely, it relates to this subject. The ground I am about to cover in the next few minutes was taken from one of our Strategic Plans from the mid-1970's. Most of what it said many years ago has come to pass, more will. And it describes exactly what is happening to us all today—and tomorrow.

"There has been and will continue to be remarkable change in the industry. A great number of acquisitions, and change in many other respects.

"Why?

(Continued on page 26)



All that meat and no potatoes

Not a bad idea, especially when you consider that a very recent study on foods that "hold calories" in our body lists white potatoes right up there with candy bars.

Simply stated, what the study says is that "the way we hold calories in the body may be a result of our insulin response to different foods. One function of insulin is to pack away every calorie that the body takes in." If we eat foods that don't immediately jump the insulin level, our overall metabolism responds differently and we don't necessarily deposit the calories.

Most nutritionists have been urging us to cut down on our intake of fats and protein and increase our intake of foods with complex carbohydrates.

But which carbohydrates we eat make a difference in insulin release.

For example, new studies show white potatoes shoot the glucose and insulin levels as high as a candy bar. The circulating glucose from the potato is likely to be packed away as fat.

Pasta (made with semolina), on the other hand, qualified for the "good group," a finding that astonished many. Pasta produces a flat reading on glucose levels and insulin release.

We have nothing against the good ol' potato. The fact is, we enjoy potatoes. And we don't suggest totally replacing the potato with pasta. We just suggest that it's a good idea to vary our diet — like meat and pasta a couple of times a week.

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Marketing vs. Production

(Continued from page 23)

"The industry is overpopulated and the total pie is divided into numerous small pieces; no one player has as much as a 20% share nationally. All brands are regional in character. That makes entry into the category easier, since there is no dominant national brand. Most importantly, the pasta industry has grown at a much more rapid rate than dry grocery-food products in general."

I'm going to interrupt this review of the Plan for a quick statistical update:

In the last seven years alone, pasta tonnage has increased 12.4%—more than triple the 4% growth rate of all dry grocery-food categories as a group. Now, returning again to the mid-1970's Plan description of coming change in the industry:

"Since major food firms are finding it difficult to grow in a relatively flat overall grocery market, they are searching for those categories that do have growth, and then entering the categories, usually by merger.

"The industry is comprised of family-owned firms including many with ownership concerned with retirement of its principals and succession of management.

With larger firms to become dominant, changes in the following areas are foreseen:

"*Sophistication* — Large grocery manufacturers bring with them more sophisticated marketing techniques and larger sales and marketing staffs than this industry has ever seen.

"*Geographic expansion* — As the major firms vie for planned expansion and growth, smaller, under-staffed unsophisticated, under-financed pasta manufacturers are going to fall out or be acquired more rapidly.

"*Advertising* — The percent of advertising dollars to sales never has been high in the pasta industry. With the major manufacturers moving in and with their significant purchasing power and leverage in media dollars, this will change.

"*Distribution* — As pasta manufacturers become a part of a larger grocery organization, the possibility exists that integrated shipments with the parent and the use of corporate distribution centers could change the comparative distribution-cost-differential among existing competitors in many markets. Certainly more than in the

past, fiefdoms will not be left to the regional lord.

"*Finance* — The large organizations coming into the industry operate with far more zeroes on each line of their P & L than we are used to with family companies. Although there are many places for this money to go, it is safe to say that dollars available for growth and expansion will be significantly greater.

"*Industry composition* — Dominated by family-owned companies for the many decades of its existence, the industry in the 1980's will have a completely different look. The driving forces will be major food giants sensitive to stockholder pressure for accelerated, stair-step earnings growth.

"*ROI* — There will be more enlightened pricing due to greater emphasis on ROI. This will be a distinct contrast to the days when, at least in some family-owned pasta firms, a comfortable living for the owners may have been the top priority.

"*National Brands* — As the industry had been structured, a truly national macaroni brand might have been impossible, unlikely, or at least a very, very long time away. This now appears simply a question of time. Small business has a diminishing role and impact on the National scene. The sophistication and strength required on a national level are not resources possessed by what have been the industry's average members.

"*Competition* — Thus, in the 1980's we are likely to see not just more competition—but more aggressive competition. The result will be the falling-out of additional smaller brands, continued mergers or sales, accelerated depopulation of the industry . . . the large becoming larger and the small, smaller. A simple survival of the fittest."

That was several years ago—and it's all coming true. De-population? In fact, the industry high point was about 250 manufacturer members. Today, there are about 47 members in this association.

With all of these changes, it is a foregone conclusion that plant management and plant operations will have to become more sophisticated, more professional, more customer sensitive.

Tomorrow, your entire seminar program will be on the subject of "change." I suggest we all listen carefully!

Marketing Orientation

Has the industry been moving towards marketing orientation? Yes, but it has. Rapidly!

General Foods, CPC, Coca Cola, Borden, Hershey and others. Those names are pretty good synonyms for marketing sophistication.

How does a marketing-oriented company determine what the consumer wants? Primarily with research. It talks to consumers and observes their patterns and draws conclusions from this data.

This is not the time nor place for a major discussion of market research, but, to fill in some of the shadows, the techniques that are used include surveys, questionnaires, concept tests, user surveys, test marketing, focus groups, and so on. They also include a continuous and exhaustive study of consumer transactions—what are they buying, and what are they *not* buying? SAMI, A. C. Nielsen, company sales records and other sources provide telling information.

Between the soft data of opinion and concept research, and the hard data of sales and economic trends, a marketing-oriented company that is good will have a sound idea of what the consumer wants.

This research not only helps determine what the consumer wants in pasta, it helps form the basis for marketing and sales strategies, advertising platforms, promotion plans and nutritional education programs to increase consumption. Also to develop new products, identify new markets.

I'm certainly not suggesting that companies are either at this end of the scale, production-oriented, or all the way to the other end, fully marketing-oriented. It is simply easiest to describe them at those extremes. All company decisions are made somewhere on that scale, between those poles, and frequently balances must be struck between marketing and production.

The point is, you are oriented in this direction — marketing — as marketing represents the consumer, and you slide away from that far end when your P & L, practicality or some major consideration forces you away. But you know your objective, and your thought processes and your decisions lead you in that direction.

Why? *Not* because sales wants you to, or marketing says that's the way it

(Continued on page 28)

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Marketing vs. Production

(Continued from page 26)

has to be, but because you know that's what the consumer wants — what she will buy vs. what she will not buy.

What the consumer gets is within the control of the plant!

I certainly would interject a caution at this point that is highly important: Be sure of what the consumer wants! If the consumer wants it to the extent that it affects her buying decision, then the company probably should want it. But if you as a member of plant management seriously question that the issue before you is an important or necessary consumer want, then you should debate marketing as to its necessity.

Marketing and sales are not always correct. This is a statement I make to this group . . . without the slightest fear of contradiction!

Once again, production and sales have one common goal: To satisfy the consumer to the point that she will buy the product you sell—not once, but over and over.

What does it take to satisfy the consumer with a pasta product? What does she want? There has been quite a bit of research conducted on this subject.

I'm going to cite some of it now. You have to decide whether it is valid or not. The balance of the day your job in the panel sessions is to "back up" those consumer "wants" into your plant — mentally — and determine how all of the things you do in the plant affect the qualities research says the consumer wants.

Here are fifteen descriptive ideas about pasta products. Which of these ideas do you think are most important to consumers?

- (1) Spaghetti that tastes as good as it looks — rich and delicious
- (2) Spaghetti that you can undercook or overcook and it's still just right
- (3) The spaghetti that doesn't get sticky—even if you can't serve it right away
- (4) The quick-cooking spaghetti
- (5) Whole wheat spaghetti—a delicious taste and nutritious too
- (6) Spaghetti made with eggs—like your favorite noodle
- (7) Spaghetti made from a blend of quality wheats instead of a single wheat
- (8) High protein spaghetti — almost a meal by itself

- (9) The low-calorie spaghetti — eat as much as you like
- (10) The less starchy spaghetti
- (11) 20% more spaghetti per box at the same price as your favorite brand
- (12) The light and tender spaghetti
- (13) Short spaghetti that you can eat with a fork without rolling it up
- (14) The firm spaghetti
- (15) Spaghetti with a golden color

Compare your answers with the results that come from an actual consumer concept test. You will note there are some significant differences between what you think consumers want and what this particular research reports that consumers said they want.

You listed what you felt were the consumer's top 2 choices. As a group, you said "Taste is first"; "Not sticky is second"; "undercook/overcook is third"; "Firm is fourth"; "Color is fifth."

You were not asked about macaroni; consumers were. Note that their response is quite a bit different than for spaghetti.

Ideas Like Very Best (Top 2)

Base: 200 Users Each Product

	Spaghetti	Macaroni
Not Sticky	36.0%	21.0%
Taste Delicious	27.5	27.5
High Protein	18.0	17.0
20% More	18.0	14.5
Undercook/Overcook	16.5	20.0
Less Starchy	14.0	14.0
Low Calorie	14.0	15.5
Made with Eggs	12.5	15.5
Light/Tender	9.0	13.5
Whole Wheat	8.0	8.5
Quick Cooking	7.0	10.5
Firm	6.0	7.5
Blend of Wheats	6.0	6.5
Short/Miniature	4.5	5.5
Golden Color	3.0	3.0

200.0% 200.0%

This test is not the only one ever administered to the purchasers of pasta products. But it is one valid test that is workable and usable for today's discussions. Certainly the attributes listed are a core group of things the consumer wants, to varying degrees, and can form the basis of your discussions today.

The Plant's Response

The consumer says she does not want her pasta to be sticky.

What contributes to a pasta product being sticky or not sticky? The raw material? Auger speed and ratio? Dough temperature? Moisture content? Drying? Re-grind?

Is taste a function of raw material formula, or is it influenced by certain manufacturing techniques?

What decisions in plant management affect your ability to provide a product that is in fact "less starchy"?

If she wants golden color, what does that say about raw material, vacuum on the press, drying, the kind of die you use?

Is firmness a function strictly of gluten or protein content?

What are the things you do in your plant that determine whether your end product performs well if it is somewhat overcooked or undercooked?

If you are aware that the consumer will respond very favorably to a promotional concept of a "20% more" offer that requires troublesome packaging, warehousing and shipping adaptations to implement, what is your attitude?

These are the kinds of discussions your should be having in your meeting with the panel groups today. How do any or all of these factors—and other factors beyond those 15 — that impact on the consumer buying decisions, affect:

- Raw Materials
- Mixing & Extrusion
- Drying
- Finished Product Testing

As you move into your panel discussions, remember the starting point. For production as well as marketing, remember the common objective: the consumer.

It is for her you make this product —not for you!

What does she want?

How do you give it to her?

What the consumer gets is within the control of the plant!

What do you do in your plant and in plant management to assure that your product is what the consumer wants?

I'm kind of anxious to find out!

Sympathy to the Ballas Family

Janice Lee Ballas, wife of Leonard Ballas, Ballas Egg Products Company of Zanesville, Ohio, died May 16. The Ballas' are long time friends and members of the NPA.

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The Why's and Wherefore of Pasta

by Lois Terry, Quality Assurance
Department, Good Foods, Inc.

As in any food plant we pretest all of our ingredients for salmonella, coliforms, e. coli, molds, etc, we also take our end product one step further, we test everything toward their end use. We manufacture various types of products in our plant, retail, food service and industrial. Flour and egg ingredients are purchased from other sources. The largest volume of ingredients used in Semolina and durum flour, milled from Hard Durum Wheat. There are some special flours purchased for specific products i.e.; Government macaroni and spaghetti which have their own specifications.

Pasta is a natural product, it does not contain any seasonings, coloring agents or preservatives. For a pasta product to be called a noodle it has to contain at least 5 1/4 % egg solids. If a pasta product contains any egg, it has to state it on the package somewhere.

Daily Samples

The first thing we do every morning is to go into the plant and pull samples from all packaging machines, we then test them for each individual package direction. In the dry and cooked state, we check for eye appeal, product color and shape, in the cooked state we also check for firmness, mushyness, taste and water color. The firmness and mushyness is tested by picking up the product feeling and pulling on it to test for the texture, the taste is tested by actually eating some of the cooked product. If the color of the water is cloudy, we know the gluten is coming out and the product will not hold up to our high standards. The types of tests we do are: (1) Consumer level, package directions; (2) Institutional, continuous cooking; (3) Canning process, boiling so many minutes, chilling with cold water, and re-cooking, re-creating the retort process.

We never use salt in our quality assurance testing, we want to taste the actual product, we feel salt could cover up a flavor in case something has happened after the initial testing of the ingredients. We keep daily quality assurance reports on everything we test, on these sheets we write down the actual date, the line the product was produced on, the bin number it was packed from, the type of product, the

company's name it was packed for and their recommended cooking time. The reason we keep all this information is because we pack for several different companies, even with all the testing we do, we know there is a chance that something could happen to the product after it leaves our warehouse. If the end user sends us the entire package, we can take the code date, go back to our quality assurance sheets, flour sheets, etc., very easily. We also do a lot of visual testing in the plant, after the product is dried and at the time of packing.

We look for pre-dryer spots and what we call "checking." Pre-dryer spots show up as white spots on the product and will not affect the cooking quality. "Checking" is little cracks or lines, when this product is cooked, the product will split where ever there is a crack. The nice thing about pasta products is, if we do have a problem, we can normally grind it back into flour and send it back through the system. At the time of testing, if we have a problem, the first thing we do is re-test the product to make sure we didn't make a mistake. If the results are the same we put a hold on the product, until we find out if we have a problem with the whole bin or is it just a small portion of the bin.

Plant Tours

We do give tours in our pasta plant, they see the manufacturing, drying and packaging of pasta. Then we take them to the Martha Gooch Test Kitchen, where we sit down and discuss and answer questions on pasta. Some of the things we bring out are: (1) What is the correct area to store pasta; We recommend storing pasta in the lower cupboards away from any appli-

ances that produce heat or humidity; (2) What do you do if you have a problem with pasta; Regardless of who's or what the product is, always send in the entire package, so the company can get the code date. The code date allws the company to check back into their records and also see how old the product is.

We also do a lot of consumer programs, going out to schools and extension groups. We show them the different types of pasta, explain what type of flour each is made from and explain why they cook up differently. We explain that cooking directions on all packages, regardless whether it is pasta or frozen dinners, are extremely important, as the old saying goes, "If all else fails, turn the package over and read the directions."

We are trying to teach the consumer through advertising and recipes that pasta has a real nutritional value. Pasta is being recommended in a lot of diet programs today. After eating pasta you feel full, the fullness stays with you and you do not feel the urge to start nibbling on sweets. A lot of people do not realize there are less calories in a cup of pasta than there is in a cup of yogurt. A lot of people eat yogurt for lunch, however it does not have that satisfying full feeling you get from eating pasta.

The difference between the hot and cold macaroni is that when macaroni is prepared in a salad, it has dressing or liquid around it, the macaroni will continue to expand, as it expands the volume of the product increases and the calorie count goes down. There are a couple of spaghetti diets out where you eat spaghetti every day. You not only lose weight, you eat well, lose fat and retain muscle tissue. Pasta is also very low in sodium. There is less than 5 mg of sodium in a macaroni product and 16 mg of sodium in a noodle product.

	Pasta (Serving 1 Cup)	Yogurt (Serving 1 Cup)
Macaroni	Hot 155 Calories	260 calories
Macaroni	Cold 117 calories	260 calories
Macaroni and Cheese	Hot 288 calories	260 calories
Noodles (Egg)	Hot 200 calories	260 calories
Spaghetti	Hot 155 Calories	260 calories
Spaghetti, Tomato Sauce and Cheese	Hot 190 calories	260 calories
Spaghetti, Tomato Sauce and Meatballs	Hot 258 calories	260 calories

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When talk about pasta production turns to drying temperature, no one talks alike.

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JULY, 1984



Electricity: A Powerful Friend

by Jeanie K. Irwin,
Loss Prevention Consultant,
Michigan Mutual Insurance Co.

Electricity is everywhere. Our homes and work areas are interlaced with it as a source of convenience and power for our tools and for the products we manufacture. It's such a familiar part of our daily lives, however, that we tend to forget what lethal potential it has.

Wise use of electricity in a controlled environment reduces the possibility of accidents. Careful planning and timely inspection to continually analyze, test and maintain all equipment is an important practice.

However, even when the most assertive maintenance program is carried out and the best safety precautions are taken, humans are subject to a margin of error and accidents can occur. Therefore it is important that all of us have some basic knowledge of electricity so that we may respond to an emergency, should one arise.

Electricity is an energy force that flows along electrical conductors. Water, most metals, wet ground, and even human beings, are conductors of electricity.

Electric current may flow from a wire to an electrical device. Thus, when a person touches or is touched by an exposed wire, the current can flow through his body into the ground.

Perhaps you or someone you know has experienced a mild shock while using electricity at home or on the job. Unfortunately most people forget the incident without determining the cause.

Very little current is required for electrocution. At 1/100 amperage (10 milliamperes) the average male loses muscular control and cannot free himself from the apparatus delivering the shock. As little as 5/100 amperage (50 milliamperes) may produce ventricular fibrillation (rapid irregular contractions of the heart muscles), which can result in death. At 100 milliamperes, which is less current than it takes to ring a doorbell, death is almost certain.

To respond to an accident in which someone has received an electric shock, carefully follow your company's written safety policy. If none is available, one should be developed and

orientation provided to all departments. A good safety policy should include the following points:

- Identify the power source and shut it off — if you know the correct technique for doing so.
- Call for help.
- Note the time the accident occurred.

• If you have been able to identify the power source and have successfully shut it off, go to the injured person and evaluate the extent of injury.

• If you determine upon examination that the person has suffered cardiac arrest (you can determine this by checking for the absence of the carotid pulse), and if you are trained in cardio-pulmonary resuscitation, move the victim to a flat hard surface and initiate CPR.

• If you are not trained in CPR, do not attempt it!

• Move onlookers away from the area so that they will avoid injury, and the area will be clear for others to work.

Each person has a responsibility to be continually alert for safety hazards and to report them as they are encountered. Assess the work area frequently for faulty equipment or equipment that is showing signs of wear.

Electrical or power supply cords can pose serious hazards. To avoid tripping and falling hazards and possible damage to the cords, they should be carefully placed away from aisles and out of trafficked areas in the workplace. Defective cords should never be used.

It is necessary to remember the following principles when handling electric cords in and around work stations:

• The cords should never be pulled or dragged over sharp objects or tools. They should never be pinched in any way which could damage cord insulation and create a safety hazard.

• When cord insulation is damaged, the cord may no longer be water-resistant. Therefore, the insulation could absorb moisture which would short-circuit the mechanism or cause excessive current leakage to the ground.

• Exposed wires can shock a worker who contacts them.

• Power supply cords should never be wound tightly around the enclosures of appliances, tools, or lamps. This practice could damage insulation and break conductor strands at the point where the cord is bent sharply.

• Electric cords and fittings should be inspected regularly. They should be wiped clean and examined for small breaks, abrasions and defects in their jackets.

• Don't spill solvents on cords. Some solvents can be damaging.

• Assembly, repair and maintenance of electrical equipment should only be done by qualified authorized personnel. Immediate reporting of worn equipment will expedite its maintenance or replacement.

• Before using electrical equipment, make sure your feet and hands are dry.

• If you receive a shock from a piece of electrical equipment, stop using it and have it checked before using it again.

Electricity is a force that is meant to work for you. Take proper safety precautions whenever you use it. Do not hesitate to report even the smallest incidents to your supervisor. Your alertness could be rewarded by sparing yourself or a fellow employee physical injury. Remember the lethal potential of electricity, and handle it with care.

Bryan R. Gibbs

Bryan R. Gibbs joined Cerebos Limited in 1963 as a salesman and by 1968, had been appointed Managing Director of Sharwood at Company Limited, Cerebos's grocery food company.

After the takeover of Cerebos by RHM, Bryan held appointments in the Food Service Division, ultimately becoming Managing Director of the Food Service Company, and was then appointed Managing Director of RHM Foods, the company which handles all of RHM's grocery products.

In January of 1984, Bryan was appointed President and CEO of RHM Holdings (USA) Inc., which includes RHM Macaroni, Inc., The Red Wing Company, Inc., and Indian Summer, Inc.

Bryan is married and has two children.

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EUROPE REVISITED II
Spring 1984



M. Lundes and Bob Green

Marseille is the great seaport of France, the greatest on the Mediterranean. It is also a large manufacturing center and home of Rivoire & Carret, largest pasta producer in France with facilities here and near Paris.

The Marseille plant managed by Engineer Robert Fitoussi employs about 300 workers in the plant and 30 in administration. They have 20 silos for the storage of raw material each holding 20 tons.

Most of the pasta is packed under the Rivoire label. They do some private label as well as making baby food of tapioca and sugar and cous cous sold to the North African trade.

Msr. Landes, also an engineer, showed us through this fine establishment.

In Milan

In Milan we had a pleasant visit with Cesare Valletti, Chairman of Dott. Ing. M. G. Braibanti & Co. In the evening he took us to the famous restaurant Savini in the Galleria and presented Fran with a Gucci scarf and me with a Rolex watch "for services to the industry."



Security gate at Rivoire et Carret.

In reviewing plans for next Spring's visit to the IPACK-IMA Show in Milan, he proposed a visit to their press manufacturing facilities at Roveretto, en route to Venice.

Braibanti sells about a third of the pasta manufacturing equipment in the world market.

In Padova

About an hour and half west of Venice is Galliera Veneta in the province of Padova—the home of Officine Meccaniche Pavan S.p.A. Pavan was established by brothers Mario and Neco in 1948. Neco was killed in an automobile accident a year ago.

Innovative pasta producers they improved equipment and went into the

manufacturing of it. They have expanded their horizons to include equipment for making breakfast cereals, pellets, and snacks in a company called Mapimpianti.

Sales Manager Marco Manzini, who gave an excellent presentation at the N.P.A. Winter Meeting, was called suddenly to Moscow. His secretary Rosanna Amati and sales manager in northern Europe Pietro Morandini showed us the Pavan facilities.

Visits to Braibanti and Pavan as well as Buhler Brothers in Uzwil, Switzerland next Spring after the IPACK-IMA Show in Milan will be very educational to pasta plant personnel from the United States.

Hospitality will be warm and generous. We were served lunch in Pavan's Club facilities for executives.

Continued on page 36



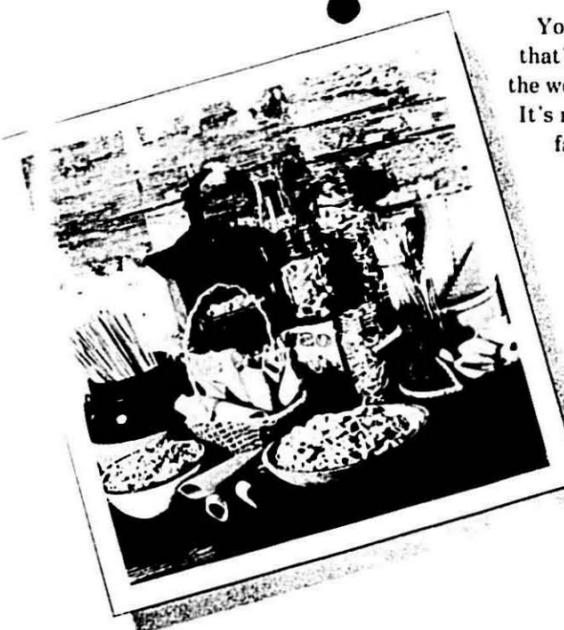
Bob Green presented Rolex watch by Cesare Valletti, Braibanti Corporation, Milan.



Rafael and Mercedes Castellvi of Barcelona. (See Jurc page 13.)

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Our best to you...

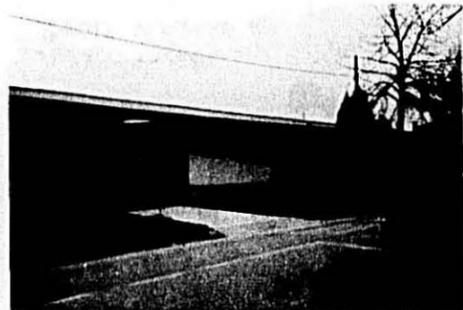


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the durum people



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Offices of Pavan, Galliera Veneta.



Valerio Sangiovanni, Bob Green and Pietro Manfredini.

and visiting customers. We remarked how we enjoyed the vegetable sauce of the macaroni. Rosanna Amati gave us the recipe:

Vegetable Sauce for Macaroni

- 180 grams green and black olives
- 100 grams onions
- 300 grams peeled tomatoes
- 50 grams olive oil and butter

In a sauce pan heat olive oil and butter. Brown the chopped onions stirring frequently. Stone the olives and cut them into thinly sliced pieces. Then, add them to the sauce together with the tomatoes and salt to taste.

Cook the sauce on low heat for a half an hour.

For added flavor: a pinch of parsley and a chopped red pepper.

Makes four servings.

The Great International Pasta and Noodle Recipe Contest

The Ideal Macaroni Company and The Weiss Noodle Company, both headquartered in the greater Cleveland area are jointly sponsoring the Great International Pasta and Noodle Recipe Contest.

Two Grand Prize winners will each receive an all expense paid vacation for two to the Culinary Capitals of Europe via TWA, the number one airline across the Atlantic.

Additionally, twenty finalists will each receive \$100 in free groceries and the top 500 entrants will each win a Pasta and Noodle Cooker. And in the contest, everyone is a winner! All who

enter will receive a packet of valuable coupons and offers worth over \$5.00.

The twenty finalists will vie for the two European Vacations in a head to head cook-off to be held at the Cuyahoga County Fair in Berea, Ohio, the week of August 6, 1984. Winners will be announced at the fair on Sunday, August 12. A schedule of cook-off times will be available at the fair and the public is invited to visit the Recipe Contest Tent and watch the cook-off.

To enter the contest, a recipe that uses any Weiss and Ideal product as a main ingredient and an official entry blank or facsimile must be mailed to "Recipe Contest" P.O. Box 39670, Solon, Ohio 44139. The contest ends June 15, 1984.

Recipe blanks and complete contest rules are printed on Ideal Macaroni and Weiss Noodle and Soup packages. Many grocery stores will also have available printed entry blanks.

The contest is being publicized via 30 second T.V. spots, 60 second radio spots and newspaper ads during April, May and June.

For further details, contact Mike Syntax, Syntax Advertising Agency, 4652 Warrensville Road, Cleveland, Ohio 44128 (216) 662-2282.

Lipton Packaging

The packaging for Lipton's "Noodles & Sauce" and its new "Rice & Sauce" lines of instant dinners is process printed in seven colors with a high gloss varnish and is designed to withstand considerable abuse.

Made by Rexham's Flexible Packaging Division, its rugged construction is an important feature, particularly for the packaging of the dehydrated

noodles, which are sharp, hard, abrasive and prone to puncture the package. The tough structure means not only product integrity throughout the manufacturing, distribution and merchandising cycle, but extended shelf-life as well. Moreover, the high-quality graphics provide effective point-of-purchase appeal.

Rexham's Flexible Packaging Division specializes in converting films, foils, papers and resins into precision printed, laminated and coated materials for consumer, health care and technical applications.

For more information on the Division's product line, write to: Hunter Phillips, Markets Manager, Rexham Corporation, Flexible Packaging Division, P.O. Box 35068, Charlotte, NC 28235; or telephone toll free (800) 438-5915. In North Carolina: (704) 371-5826.

Food Engineering Corporation

Food Engineering Corporation, 2765 Niagara Lane, Minneapolis, Minnesota 55441. Phone (612) 559-5200. Manufacture, assemble and service a standard line of short goods pasta processing equipment, including dryers, coolers, vibratory conveyors, bin storage systems, continuous belt storage and accumulating systems, vibratory distribution and conveying systems to packaging, and other related equipment. Also suppliers of dryers, accumulating systems, vibratory conveyors and other processing machines and equipment from many other food industries. Mr. Ralph D. Burgess, Jr., President. Mr. Donald Lyman, Sales Technical Manager.

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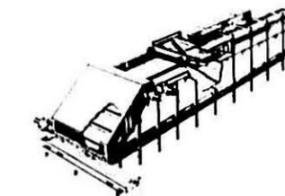
Efficient processing of pasta items including both free and non-free flowing products takes special care, special equipment. Food Engineering Corporation offers you top quality processing machines and systems to meet the needs of your most challenging applications.

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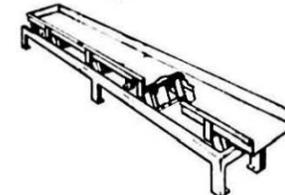


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Planting Completed

Planting of spring wheat and durum was virtually completed, and emergence was slightly above the year-ago pace and the five-year average by the end of May. While moisture was generally plentiful during the final days of seeding, strong winds subsequently caused considerably drying. Topsoil moisture in North Dakota was rated 80% short or very short; two weeks back it had been mostly adequate to surplus.

Quarterly Durum Report

The Crop Reporting Board on February 1, 1984 reported that growers intend to plant 3.85 million acres of durum wheat in the spring of 1984. If realized the planted acreage will be up 50 percent from last year's 2.57 million acres, but would be 11 percent less than the 1982 seeded acres. Intended plantings in North Dakota, the primary durum State, are up 48 percent from 1983.

Stocks

Durum wheat stored in all positions on April 1, 1984 totaled 125 million bushels (3.39 million metric tons), down 24 percent from the 1983's record high 164 million bushels (4.47 million metric tons) and 6 percent less than April 1, 1982. Farm stocks of 89.3 million bushels (2.43 million metric tons) were 31 percent below the 130 million bushels (3.54 million metric tons) on hand April 1, 1983. Off-farm stocks at 35.2 million bushels 959 thousand metric tons) were up 4 percent from April 1 a year ago. Disappearance indicated during January-March 1984 quarter stands at 8.53 million bushels (232 thousand metric tons), down 66 percent from the 25.0 million bushels (681 thousand metric tons) recorded during the same period in 1983.

Exports

U.S. durum wheat exports during the June-March 1983-1984 period totaled 51.1 million bushels compared to 35.5 million bushels during the same period a year ago, an increase of 15.6 million bushels. The largest importers were Algeria, Chile, France, Italy, Netherlands, Poland, Tunisia and Venezuela taking 25.1 million bushels which accounted for well over one-half of the durum wheat exports.

Duluth/Superior

Exports of durum wheat out of Duluth/Superior since the opening of the shipping season through May 7, 1984 totaled 2.6 million bushels in comparison to 7.8 million bushels one year ago, a decrease of 5.2 million. Stocks of durum wheat at the twin ports as of May 17, 1984 totaled 6,494,000 bushels compared to 4,051,000 one year ago. The stagnant demand for terminal quality durum continued as inventories remained burdensome.

Canadian Situation

According to Canadian Statistics, based on March 1984 findings, Canadian farmers intend to increase acreage by 700,000 acres and if intentions are carried out, prairie farmers will plant 4,200,000 acres compared with 3,500,000 grown in 1983. The visible supply of Canadian durum is licensed storage and in transit on April 25, 1984, amounted to 857.3 thousand metric tons, 213.3 thousand greater than last year's figure of 744.0. Canadian exports in June-March 1983-1984 period amounted to 1.9 million metric tons compared with 2.1 million one year ago, a decrease of 213.1 thousand.

Wheat Industry Council Officers Elected

The Wheat Industry Council Board of Directors elected five of its members to serve as its officers and Executive Committee for 1984 at the Council's Annual meeting May 17 in Washington, D.C.

Lauren H. Batty, president of ITT Continental Baking Company, Dye, N.Y., new serves as Council Chairman. Batty, an end-product manufacturer, formerly held the Vice-Chairman position.

In the Vice-Chairman position is Vivian J. Thuesen. Thuesen is a wheat producer from Dagmar, Montana.

Philip W. Orth, president of the Philip Orth Company, Oak Creek, Wisconsin, fills the position of Council Treasurer. Orth is a processor representative on the Council's Board of Directors.

Relected as Council Secretary is Alice H. Perkins. Perkins, a consumer representative on the Board of Directors from the American Dietetic Association, is a nutrition consultant based in Western Springs, Illinois.

Relected as Member-At-Large is Paul A. Vermynen, president, A. Zerega's Sons, Inc., Fair Lawn, New Jersey. Vermynen is an end-product manufacturer.

Immediate past Chairman Raymond L. Davis, a wheat producer from Dix, Nebraska, serves on the Executive Committee as an ex officio member.

Durum Growers Association President

Jerry Thuesen, Reserve, Montana, was named President of the U.S. Durum Growers Association at a recent board reorganizational meeting. Thuesen succeeds the late Monroe Scheflo, who passed away in April.

Scheflo's contributions to agriculture, the wheat industry and especially to the U.S. Durum Growers, will long be remembered," Thuesen said.

"All of us on the board and membership at large hope to continue the tradition of service established by Monroe," he said.

Thuesen has been a member on the U.S. Durum Growers Board for eight years and has served as vice president for two years.

He has been a member of the Montana Growers Association for nine years. He and his wife, Nancy, operate a farm where durum is the main crop. They have three children: Steven, 17; David, 14; and Laurel, 7.

Bill Oastad, Manfred, North Dakota, was elected vice-president and DuWayne Tessmann, Goodrich, North Dakota, relected secretary-treasurer.

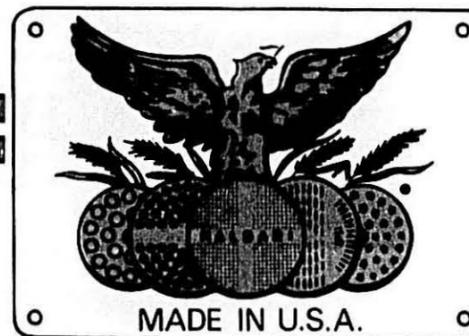
Dan Schaefer, Glenburn, was named to represent the U.S. Durum Growers as an ex-officio member of the North Dakota Wheat Commission.

New directors named at the spring annual meeting include John Rice, Jr., Maddock, North Dakota; Dan Skarvagard, Makoti, North Dakota.

Retiring board members include Robert Campbell, Garrison, North Dakota and Dan Schaefer. Remaining board members are Herb Olson, Langdon; L. A. Braunagel, Devils Lake; Eugene Nicholas, Cando; Lydie Olson, Klotten; Charles Lindseth, Silva; Lawrence Scheresky, Des Lacs; Mark Nesheim, Stanley; and Don Jarmel Britton, South Dakota. Membership services are based at R. 1 Box 100, Goodrich, North Dakota 58444.

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Egg Outlook

Egg Production To Remain Below Last Year

During January-March 1984, egg production was down 2 percent from the 1,433 million dozen produced in first-quarter 1983. The decline resulted from a smaller number of layers during most of the period and a reduced rate of lay from last year. Strong egg prices encouraged producers to try to increase production. Since the only course open was to hold back old hens, the rate of lay declined both because the hens were older and because of the colder winter this year. Egg production would have been even lower had there not been an extra day due to leap year.

Layer numbers on April 1 were 1 percent above last year and are expected to stay near a year ago until fourth-quarter 1984. The hatch of replacement layers has been below year-earlier levels until recently. During first-quarter 1984, replacement pullets were down 14 percent from 1983 levels. In the second quarter, replacements will be down 4 percent from 1983, but third-quarter replacements will be up almost 2 percent. However, the large number of older hens that may be sold as additional replacements become available are expected to cause egg production to remain below last year until the fourth quarter.

Egg Prices To Weaken

During first-quarter 1984, prices of cartoned Grade A large eggs delivered store-door in New York averaged \$1.03 per dozen, up sharply from 66 cents last year. Prices were strong because of the strong general economy and reduced supplies of eggs, especially in the beginning of the quarter when cold weather and avian influenza reduced output.

Prices for eggs remained strong in early April as traders anticipated additional movement for Easter. With increased employment, more eggs were expected to be needed, but supplies likely were near last year or a little below. New York egg prices dropped sharply after Easter but still averaged \$1.04 per dozen during April, up from 68 cents last year. Unless producers sell more old hens than expected after Easter, reducing supplies more than anticipated, second-quarter prices are likely to average 86 to 90 cents per

dozen, up from 69 cents last year. During third-quarter 1984, prices for eggs in New York may average 5 to 11 cents per dozen above the 74-cent average for 1983, if supplies are slightly less than a year ago.

Stocks at Low Levels

On January 1, 1984, cold storage stocks of frozen products and shell eggs totaled 9 million dozen shell equivalent, down sharply from 20 million in 1983. On April 1, stocks were 10 million dozen, down from 18 million in 1983. Stocks of shell eggs were up from last year as eggs were being held for Easter. Short supplies and high prices for eggs have discouraged the holding of stocks.

Breaking Use About Steady

In 1983, eggs broken under Federal inspection totaled 732 million dozen, nearly the same as the 733 million broken in 1982. Short supplies and higher prices caused breaking use to decline 2 percent in the fourth quarter, but this reduction was offset by first-half use. The lower ending inventory suggests that the use of egg products was higher in 1983 than in 1982. The improvement in the economy, plus declining unemployment, has likely meant additional demand for processed items that would use eggs broken commercially.

In first-quarter 1984, 179 million dozen eggs were broken, up from 175 million in 1983. Eggs going to breakers rose in February from a year ago as supplies increased, partly from larger imports, and prices declined. The number of eggs broken during March was up. With the economy remaining strong, demand for egg products should also remain strong during 1984. The number of eggs broken commercially should increase in second-quarter 1984 as egg supplies increase and prices slip. Cold storage stocks of egg products may be partially rebuilt during the third and fourth quarters as eggs become more plentiful.

Government Figures Err

Durum stocks on April 1, included in the all wheat total, were 124,513,000 bus, down 24% from 164,177,000 bus last year, 6% less than 132,638,000 bus two years ago and the smallest for this date since 83,256,000 bus on April 1, 1981. Durum stored

on farms was 89,266,000 bus, down 31% from 130,138,000 bus last year. Farm-stored durum accounted for 72% of all stocks, down from 79% last year.

Indicated durum disappearance during January-March was 8,530,000 bus, down 66% from 25,024,000 bus from the first three months of 1983 and the smallest apparent usage for a first quarter since 6,422,000 bus in 1963 or 21 years ago.

That the data on durum disappearance "just doesn't add up" was a common comment among industry observers. For one thing, durum stocks on April 1, 1984, were about 15 million bus or more above trade expectations — a wide difference. The stocks were so much larger than anticipated clearly accounts for the unreasonably low figure for January-March durum disappearance.

Usage Down?

Indeed, indicated durum usage in January-March 1984 was not only smaller but substantially smaller than in any year since 1963. Furthermore, data from the Federal Grain Inspection Service show that durum export inspections in January-March were 12,533,000 bus, or 4 million more than the indicated disappearance during the same period. This would mean not only no net domestic use, but imports of 4 million bus to cover total durum clearances — and this, of course, did not happen. Industry observers estimate January-March durum mill grind in the range of 10 million to 15 million bus.

The recent controversy over the reliability of statistics from the Crop Reporting Board has focused on corn and soybeans. Problems with wheat numbers have attracted less attention, but the data on durum and other spring wheat in the past two years have been filled with inconsistencies.

A major part of the problem may be that a much larger share of durum and other spring wheat is stored on farms than is true for all wheat, and "getting a handle" on the amount of wheat in farm bins may be considerably more difficult than for wheat stored in elevators. Some observers note that farmer response to the questionnaires from the Crop Reporting Board has declined substantially in recent years.

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Weight Watchers Spaghetti Sauce

Weight Watchers in introducing a thick, rich Spaghetti Sauce that has 20% fewer calories than national brands. To reduce the calories yet maintain the rich flavor, Weight Watchers eliminated the fillers.

It cut the calories by taking out the oil, starch and added sugar, and replaced these items with more plump, sweet, juicy tomatoes to maintain thickness. Then it added a pinch of onion, hint of garlic, dash of basil and oregano to delicately season the sauce.

Weight Watchers Spaghetti Sauce meets the needs of serious dieters look-

ing for a spaghetti sauce that tastes as good as regular sauces yet has fewer calories.

It fills an existing market gap since no national brands of calorically reduced spaghetti sauce exist.

The advertisement dramatically highlights the thickness and good taste of the product.

To deliver this message Weight Watchers has run a full-page ad in Family Circle, Good Housekeeping, Woman's Day, Reader's Digest and Weight Watchers Magazine during May and will follow-up with two-thirds page ads in Family Circle, Woman's Day, and Weight Watchers Magazine during June, July and August.

Rice-A-Roni Campaign

Fourteen leading women's magazines including Family Circle, Bon Appetit, McCall's, Woman's Day, Southern Living, Sunset and eight other publications are being used to promote Rice-a-Roni during May and June.

Full-color, eye-appealing ads in these 14 national and regional magazines feature a retail store coupon with 20¢ off on any package of Rice-a-Roni.

Ad copy emphasizes that with Rice-a-Roni "you get more ounces for your money."

The May and June issues of these 14 magazines go into 63 million homes.

In addition to print advertisements, there will also be a heavy schedule of network television commercials on the air during the promotional period, dramatizing Rice-a-Roni's better value theme.

The heavily concentrated multi-media coupon campaign is one of the largest spring promotions in the brand's history.

General Foods Optimistic

"Fiscal 1984 was a year of accomplishments on all fronts," James L. Ferguson, chairman and chief executive of General Foods Corp., said in announcing record sales and earnings for the fiscal year ended March 31. Progress in the year, he said, included "volume growth meeting our expectations, aggregate share of market in-

creasing, more than a dozen new products entering the market successfully and real earnings growth."

In addition to citing gains during the year by Entenmann's, Inc., the premium sweet goods baking subsidiary, Mr. Ferguson pointed out that General Foods had acquired Ronzoni Corp., fresh and frozen pasta producer, and recently agreed to acquire part of the baking operations of Oroweat Foods Co.

"We see the Ronzoni Corp. acquired in February, our joint venture with the Saimaza coffee business in Spain which began early in the year and our more recent agreement to acquire the western division of Oroweat Foods Co. as broadening our product portfolio and increasing the company's growth potential," Mr. Ferguson said.

"In turn, our announced sale of Gaines Pet Foods removes from our portfolio a business that, while successful, has less of a strategic fit."

Packaged Grocery Products Led

Packaged Grocery Products led General Foods in sales and earnings growth during the year. The group in fiscal 1984 had sales of \$3,787.5 million, up 12% from \$3,375.7 million in fiscal 1983. Operating earnings for the group aggregated \$470.4 million, up 10% from \$427 million in the previous year.

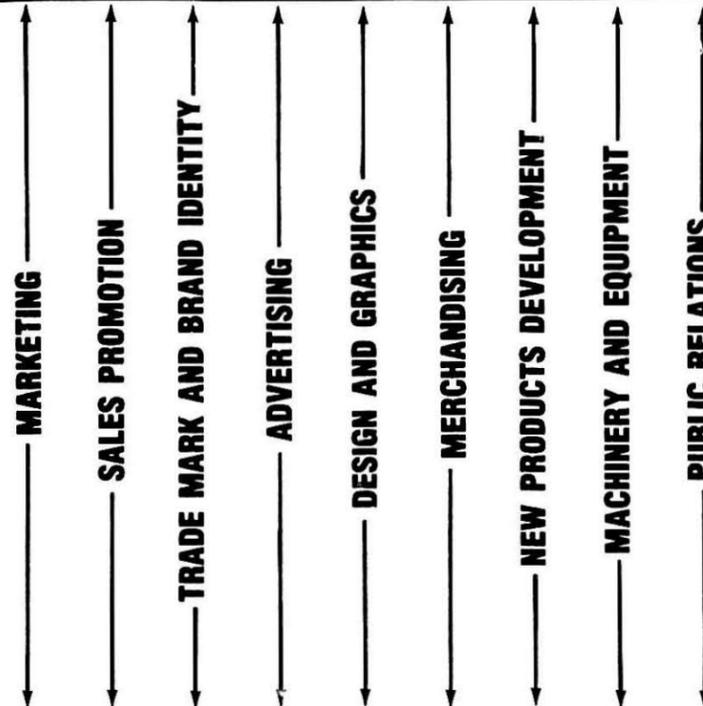
"Overall, our Packaged Grocery Products registered excellent sales and earnings growth," Mr. Ferguson said. "And the strong volumes achieved by General Foods International, especially in the Asia/Pacific area, helped to offset the negative impact of the strong U.S. dollar on earnings. Intense competition in world-wide grocery coffee and the U.S. cereal businesses decreased their earnings contributions, but the company responded decisively to defend its coffee shares and we have set cereals back on the path of growth."

In fiscal 1985, Mr. Ferguson stated, "We intend to continue taking decisive advantage of growth opportunities in new products, expanding existing businesses and acquiring new ones that will move General Foods into additional growth areas of the food and beverage market. In fiscal 1985, we continued volume progress. General Foods has momentum based on its solid achievement in fiscal 1984, and we expect to keep that momentum and build on it."

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