THE MACARONI JOURNAL

Volume 56
No. 6

October, 1974

Macaroni Journal

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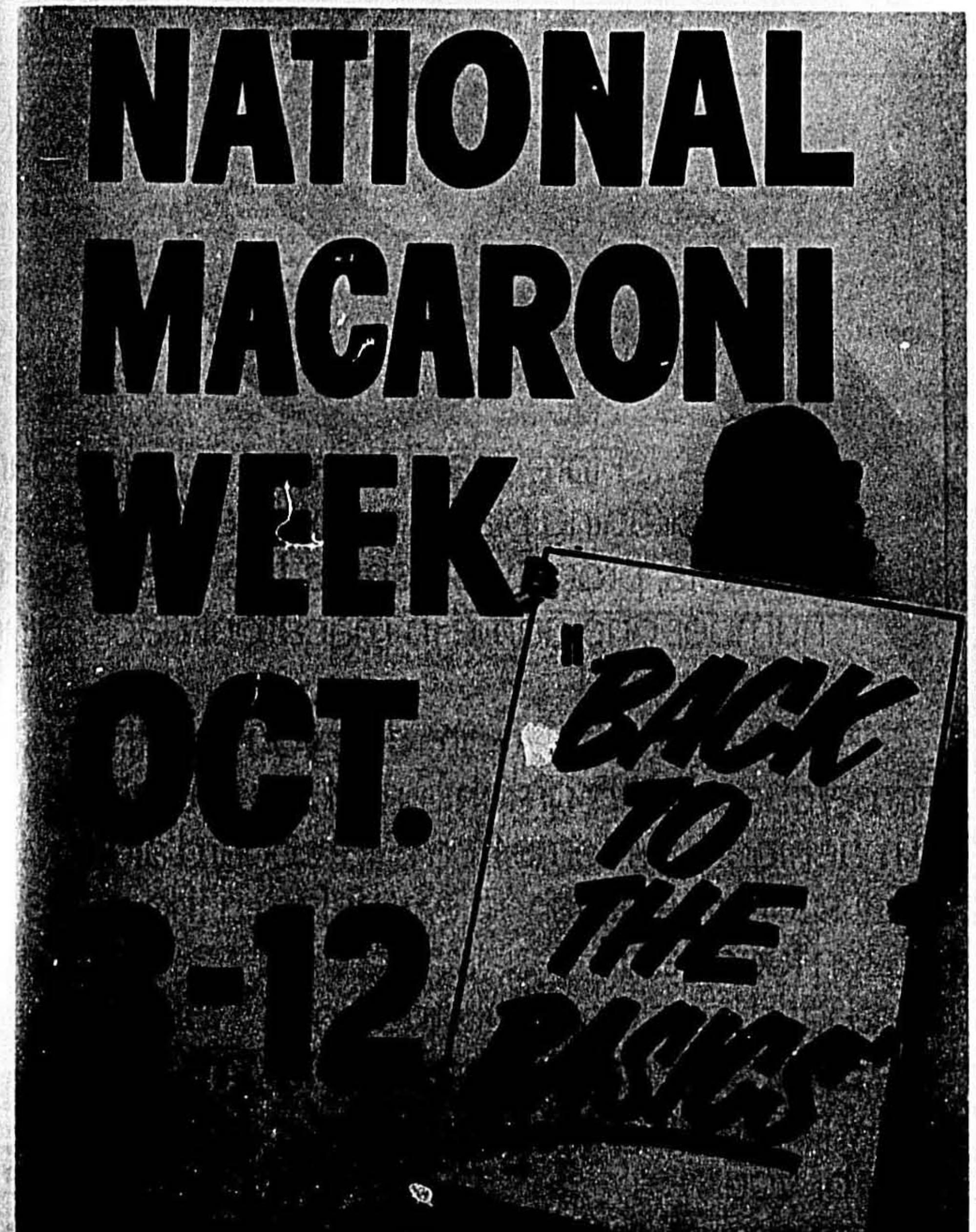

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Macaroni Journal
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In This Issue:

Editor's Notebook:

The Macaroni Industry is strong on tradition.

National Macaroni Week will be the 26th annual effort by the National Macaroni Institute to obtain national publicity for spaghetti, macaroni and egg noodles on the upbeat basis.

To herald the event the Eighth Annual Macaroni Family Reunion was held for the New York corps of food editors from magazines, newspapers, syndicated columns, supplements and related item advertisers at Tiro A Segno, New York's Rifle Club. Just as macaroni publicity has found favor with the food editors so has this annual event.

The most recent progress report sent to contributors of the National Macaroni Institute who make this wonderful promotional work possible, lists recent placements in such national magazines as Mademoiselle, McCall's, Parent's, Family Circle, Redbook, Sunset, and True Story.

Magazine breaks occurred in virtually every major market area.

Color placements were captioned with such headings as "Nutritious Meal"; "Pasta Makes Thrifty, Nutritious Dishes"; "Get More With Macaroni."

In the Sunday Supplement, Family Weekly ran in its Celebrity Cook column a recipe from Red Foxx, Sanford and Son TV star.

More than 100 stations utilized the National Macaroni Institute TV Kit with the feature "More for Your Money with Macaroni."

Cooperative publicity has recently been sent out by the Campbell Soup Company, Danish Blue Cheese, R. T. French Company, Kraft Foods, Alaska King Crab, California Tuna, California Wines, Spanish Green Olive Commission, Spice Trade Association, etc.

During National Macaroni Week, American Dairy Association will be running its fall campaign "Fall for Cheese." Joint promotions here would lead into effective merchandising.

MACARONI WEEK - a national publicity effort for macaroni products

Publicity Covers National Macaroni Week in Every Media

National Macaroni Week, October 3-12, 1974, has the theme: "Let's Get Down To Basics."

Consumer recipes will have appetite appeal, nutrition, variety, versatility and economy. It will deal with such basics and variations as Baked Macaroni and Cheese, Buttered Parmesan Noodles, and Spaghetti with Meat Sauce.

For the grocer, Macaroni Week means merchandising opportunities to build traffic, turnover, related item sales and profits.

Major market daily newspapers will receive black and white photographs as well as color with recipes and story material stressing the basic appeals of pasta products. These are supplied on an exclusive basis to food editors in 219 standard metropolitan areas, with 26,000,000 circulation per mailing.

Negro Press, with some 175 newspapers, will receive special material. Circulation 3,000,000.

Labor Press, 600 newspapers, get recipes and photographs with special recipes. Circulation 11,000,000. Same photographs and background material go to **Small Town Daily and Weekly Newspapers** with a circulation of 12,000,000.

For Television, a program kit is planned for use during National Macaroni Week, with the title, "More for Your Money with Macaroni." The kit will include script, three 33 mm color slides, and recipes for the basic pasta ideas. The kit is offered on an exclusive basis and response is expected to bring 100 or more uses.

A special radio script, with suitable recipes and background on National Macaroni Week and its theme will be sent to 581 stations across the country.

Press Reception: The Eighth Annual Macaroni Family Reunion was held at Tiro A Segno in New York on September 18. About 100 representatives of newspapers, syndicated columns, magazines, radio and television attended.

More With Macaroni

Macaroni products (elbow macaroni, spaghetti, egg noodles) appear frequently on shopping lists as consumers continue to cope with high food costs. Macaroni, in many ways, gives us more —more good nutritious eating, more fun in menu planning, more time out of the kitchen with easy recipes, more economy meals.

Meatless entrees are making more appearances. Spaghetti topped with a colorful array of vegetables—peas, carrots and yellow squash—presents this popular member of the pasta family in a nourishing new way. Cream of celery soup, a blend of Cheddar and Swiss cheeses and seasonings go into the speedy-to-make sauce to accompany the spaghetti and vegetables.

Among the papers receiving this release: Nashville Tennessean, Birmingham Post-Herald, Milwaukee Journal, Fort Worth Star Telegram, Memphis Commercial Appeal, Cincinnati Enquirer, Spokane Spokesman Review, Columbus, Georgia Ledger Enquirer, Atlanta Journal Constitution, Grit, Long Beach Independent Telegram and Oklahoma Orbit.

Nutritious

Nutrition is a prime thought in menu planning. Enriched pasta products furnish fine quality protein teamed as they usually are with complete protein foods like meats, fish, poultry, cheese and eggs. They supply substantial amounts of the B vitamins—niacin, thiamine and riboflavin along with iron. Energy is derived from the carbohydrate content in these low fat, low sodium foods.

Get More With Macaroni Salads

Macaroni Salads are one of the best ways to get more from the use of planned over or leftover foods. Vegetables, meats, poultry, cheese, eggs can all be flavorfully combined with macaroni. Pasta salads are fun to make—let imagination take over and create to your culinary content.

Macaroni Salad Special is a main course well suited to menus year around. Quick and economical to make, it also has the great make-ahead, serve-when-ready advantage. The pasta is mixed with luncheon meat cubes and vegetables. Top the salad with a dressing of mayonnaise, sour cream and mustard.

This release has gone to the following papers: Philadelphia Bulletin, St. Louis Globe Democrat, Phoenix Gazette, Grit, Charlotte Observer, Houston Chronicle, Seattle Post Intelligencer, St. Paul Dispatch-Pioneer Press, Baton Rouge State Times, Milwaukee Sentinel, Tampa Times and Fort Worth Star Telegram.

Macaroni— More For Your Time!

Supermarket trips are carefully planned excursions as shoppers keep a keen eye open for the best values. Pasta continues to appear at the checkout counter as homemakers realize its values. You can serve more economical, more nutritious, more varied, more easily cooked dishes with egg noodles, elbow macaroni and spaghetti as the base.

As increasing numbers of women work outside of the home, recipes requiring a minimum of kitchen time are in demand. How about a nourishing egg noodle dinner which is ready for the table in about fifteen minutes? This great tasting timesaver comes from the home economists of the National Macaroni Institute. While noodles are cooking in one pan so is a beautiful bouquet of vegetables—onion, carrots, corn and green beans. The sauce makes itself as the noodles are tossed with butter and the vegetables mixed with garlic, parsley and butter. There it is—tender egg noodles and vegetables in a seasoned butter sauce—and the cook has been on duty for a quarter of an hour.

This release has gone to the following papers: San Antonio Light, Houston Post, St. Louis Post Dispatch, Birmingham News, Orlando Sentinel Star, Kansas City Star and Times, Seattle Times, Philadelphia News, Toledo Blade, Dallas News, Appleton Post-Crescent and Baton Rouge Advocate.

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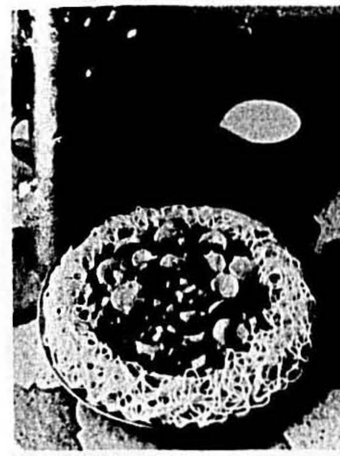
Spaghetti and Vegetables With Cheese Sauce

(makes 4 to 6 servings)

Salt
1 cup water
1 package (10 ounces) frozen peas and carrots
1 package (10 ounces) frozen yellow squash slices
1 can (10¾ ounces) condensed cream of celery soup
1 cup milk
½ cup shredded Swiss cheese (about 2 ounces)
½ cup shredded Cheddar cheese (about 2 ounces)
2 tablespoons chopped chives
½ teaspoon thyme leaves, crushed
¾ teaspoon prepared mustard
8 ounces spaghetti
3 quarts boiling water



Spaghetti & Vegetables With Cheese Sauce

Macaroni Salad Special

Fifteen Minute Noodle Dinner

In a saucepan, heat 1 cup water with 1 teaspoon salt to boiling; add peas and carrots and squash. Heat to boiling; separate squash with a fork. Reduce heat and cook covered until vegetables are tender, about 5 minutes; drain. Keep warm.

In a saucepan, combine undiluted soup, milk, Swiss cheese, Cheddar cheese, chives, thyme, mustard and ¼ teaspoon salt. Heat until mixture is hot and cheese is melted, stirring constantly with a wire whisk.

While vegetables and sauce are being prepared, gradually add spaghetti and 1 tablespoon salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander.

Arrange drained vegetables on hot spaghetti. Serve with sauce.

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Macaroni Salad Special

(makes 6 servings)

2 cups elbow macaroni (8 ounces)
Salt
3 quarts boiling water
1 can (12 ounces) luncheon meat, cubed
½ pound American cheese, cubed
1 can (21 ounces) kidney beans, well drained
2 hard-cooked eggs, chopped
1 cup diced celery
½ cup sweet pickle relish
Sliced radishes, optional
½ cup mayonnaise or salad dressing
½ cup sour cream
1 tablespoon prepared mustard
2 tomatoes, sliced
1 cucumber, scored and sliced

Gradually add macaroni and 1 tablespoon salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Rinse with cold water; drain again.

In large bowl, combine macaroni, luncheon meat, cheese, kidney beans, eggs, celery, pickle relish, radishes and ¼ teaspoon salt; toss until well combined. In small bowl, mix mayonnaise, sour cream and mustard; stir until well blended. Cover and refrigerate salad and dressing.

To serve: arrange salad on platter. Garnish with tomatoes and cucumber. Serve with dressing.

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Fifteen Minute Noodle Dinner

(makes 4 to 6 servings)

8 ounces medium egg noodles (about 4 cups)
1 tablespoon salt
3 quarts boiling water
1 cup butter or margarine, cut into pieces
1 cup water
1 cup frozen small whole onions
1 cup thinly sliced carrots
1 package (10 ounces) frozen whole kernel corn
1 package (9 ounces) frozen cut green beans
1 small garlic clove, crushed
¼ cup finely chopped parsley

Gradually add noodles and 1 tablespoon salt to 3 quarts rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Turn noodles into bowl. Add ½ cup butter and toss until butter is melted.

While noodles are cooking, prepare vegetables. In a large saucepan, heat 1 cup water and 1 teaspoon salt to boiling. Add onions; reduce heat to medium. Cover and cook until almost tender, about 5 minutes. Add carrots, corn and beans. Heat to a boil separating beans and corn. Reduce heat to medium and cover; cook until all vegetables are just tender, about 5 minutes. Drain. Add remaining ½ cup butter, garlic and parsley to cooked vegetables; toss until butter is melted. Arrange vegetables over hot noodles on serving plate.

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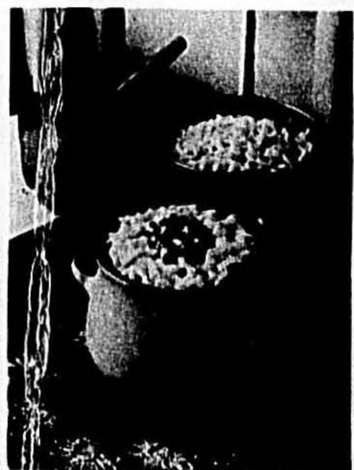
Baked Macaroni and Cheese

(makes 4 servings)

2 cups elbow macaroni (8 ounces)
Salt
3 quarts boiling water
¼ cup butter or margarine
¼ cup all-purpose flour
Dash cayenne pepper
2 cups milk
2 cups shredded or grated Cheddar cheese (8 ounces)
2 tablespoons chopped parsley

Gradually add macaroni and 1 tablespoon salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander.

Meanwhile, in saucepan melt butter. Add flour, ¾ teaspoon salt and cayenne pepper until smooth. Cook over medium heat, stirring constantly, until mixture is thick and bubbly. Reduce heat to low; gradually stir in milk and cook, stirring constantly, until mixture thickens and begins to boil. Remove from heat. Stir in 1¼ cups cheese until cheese melts. Stir in macaroni and pour into ungreased 2-quart casserole. Sprinkle top with remaining cheese and parsley. Bake in 350° oven for 30 minutes or until bubbly.



Baked Macaroni & Cheese

Buttered Parmesan Noodles

Spaghetti With Meat Sauce

VARIATIONS:

Stuffed Olives: Prepare as above. Reduce salt from ¾ teaspoon to ¼ teaspoon when adding to flour mixture. Stir in ½ cup sliced pimiento-stuffed olives with macaroni.

Peas and Carrots: Prepare as above. Cook 1 package (10 ounces) frozen peas and carrots as label directs; drain. Stir peas and carrots into macaroni.

Turkey or Chicken: Prepare as above. Stir 1½ cups cubed cooked turkey or chicken into macaroni.

Chive: Prepare as above. Substitute 1 to 2 tablespoons chopped chives for parsley.

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Buttered Parmesan Noodles
(makes 6 servings)

8 ounces medium egg noodles (about 4 cups)
1 tablespoon salt
3 quarts boiling water
¾ cup butter or margarine, cut into pieces
1 cup freshly grated or shredded Parmesan cheese, about ¼ pound
3 cups plain croutons
Chopped parsley

Gradually add noodles and salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander. Quickly toss together hot noodles, butter and Parmesan cheese until butter is melted. Toss in croutons just until ingredients are combined. Garnish with chopped parsley. Serve immediately.

Variations:

Noodles with Carrots: Prepare as above. Toss in 4 cups loosely packed grated carrots (about 6 to 8 carrots), 1 teaspoon dill weed and 1 teaspoon salt before adding croutons.

Noodles with Spinach: Prepare as above. Toss in 1 package (10 ounces) uncooked spinach, torn into pieces and ¼ teaspoon ground nutmeg before adding croutons.

Noodles with Cabbage: Prepare as above. Toss in 4 cups shredded blanched cabbage (about ½ pound), and 1 teaspoon salt before adding croutons.

A Message to Grocers:

WHERE THE ACTION IS!

From Progressive Grocer second annual report:

How 320 Product Categories Perform in the Big New Stores, July, 1974.

Macaroni products seem to have everything. They're symbolic of an amazing number of the major trends affecting the super market's livelihood:

Inflation: Shoppers always turn to pasta during hard tim

Shortages: Wild price fluctuations of durum wheat have settled down.

Consumer demand shifts: Partly to economize and part to expand her repertoire, the U.S. housewife has in rece years been turning to pasta products as all seasons food

Profit potential: Consistently above-average margin leve (18%) while the category continues to grow (25% in 1973). Every dollar in pasta sales generates another $7 of tie-in purchases.

PUSH PASTA

THE NATIONAL
MACARONI
INSTITUTE

Recipes

(Continued from page 6)

Noodles with Ground Beef: Prepare as above. Toss in 1 pound ground beef, crumbled, cooked and drained, 1 teaspoon salt and ½ teaspoon oregano, crushed, before adding croutons.

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Spaghetti with Meat Sauce
(makes 8 servings)

2 pounds ground beef
2 medium onions, chopped
2 garlic cloves, minced
2 cans (28 ounces each) tomatoes
2 cans (6 ounces each) tomato paste
Salt
2 teaspoons sweet basil, crushed
2 teaspoons sugar
½ teaspoon chili powder
1 pound spaghetti
4 to 6 quarts boiling water

In large saucepot or Dutch oven, cook ground beef, onions and garlic until beef is brown and onions are tender (about 5 minutes). Stir frequently. Drain off excess fat. Stir in undrained tomatoes, tomato paste, 1 tablespoon salt, basil, sugar, and chili powder; heat to boiling. Reduce heat to low and simmer, uncovered, 30 minutes, stirring occasionally.

Meanwhile, gradually add spaghetti and 1½ tablespoons salt to rapidly boiling water so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander.

Pour tomato sauce over spaghetti in deep serving dish.

Variations:

Cheddar Cheese: Prepare as above. Just before serving stir 2 cups shredded or grated Cheddar cheese into tomato sauce.

Ham: Prepare as above. Substitute 2 cups diced cooked ham for ground beef.

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Good Morning! We decided to capsulize our presentation this morning into a visual box score, and to hold our full "Year of Pasta" report until the Winter meeting.

Because our results have been so spectacular, we wanted to be sure that you have the opportunity of seeing the actual magazines and newspapers. We have a display set up in the Card Room for you to browse through at your leisure . . . magazines, Spring and Summer Television Kits, newspapers geographically sorted into four sections: 11 Western States; West Central States; Mid-West and New England; Southeastern States.

More For Your Money

Our 1974 theme, "More for your money with macaroni" has played back to us again and again . . . more nutrition for the money; more convenience for the money; more menu variety for the money.

Product Promotion Report — Box Score

by Elinor Ehrman, Vice President, Theodore R. Sills, Inc.

Elinor Ehrman

Cover Stories

The most outstanding media breaks this first six months of 1974 have been in major consumer magazines, with a total of 14 features in books with a circulation of over 34 million. Represented are publications in women's, shelter, romance, Negro and special interest categories.

Three of these breaks have been cover stories—Redbook's May issue carries one of the finest pasta features ever written, and this is especially meaningful since this magazine is Number One in its appeal to young marrieds. 20 Great New Pasta Recipes—Quick, Different, Cheap announced the feature on the cover. Inside, "Pasta, Pasta" titles the 9-page article with four full color pages of pasta dishes followed by a page of copy discussing Types of Pasta, How to Cook Pasta, Menu-Making with Pasta . . . and concluding with Twenty recipes ranging from entrees to desserts. Circulation—4,919,624. Our media department tells us that a one-page color ad in Redbook costs $26,025. . . . Multiply that by four color pages and five B/W and we come up with a truly valuable article.

Good Food

The second cover story ran in the April issue of Good Food . . . the last issue of this magazine which had a guaranteed circulation of 1,250,000 targeted to the mass gourmet. "Cook Faster with Pasta" was the cover title with two inside features. "Pasta Past and Present" was a 4-page pasta history including how pasta is made, nutrition, description of basic shapes. The following feature was the Cook's Bookshelf section with a center spread pasta color photo leading into a review of Italian cookbooks.

The third cover story was in Better Homes & Gardens, the February issue, with a cover photo of Spaghetti Pie—Less than 55¢ a Serving. Six additional pasta recipes were included in the special section titled "50 Recipes to Beat High Food Prices." Circulation: 7,995,491.

Multipage Features

Equally impressive were the multipage features in leading books. Most significant of these was the 12-page article in the May Good Housekeeping entitled "Great Tasting Main Dishes with Protein-rich Foods." The story leads off with a 2-photo color spread of pasta dishes. To quote, "Pasta is a vegetable-protein food: one cup of cooked spaghetti, noodles or macaroni has as much protein as one ounce of cooked meat. But vegetable protein is incomplete (lacking in amino acids essential to good health) unless combined with at least a small amount of animal protein, which is why we used both in these dishes." In another full page color photo, Macaroni, Cheese and Tomato Bake Recipe is pictured. Total of six recipes. Circulation 5,703,732.

Parents' magazine carried a four-page story in their January issue entitled "Pasta: Gourmet Meals on a Budget." Double page spread of pasta shapes along with 11 recipes. Circulation 2[illegible]17,029.

Woman's Day—Special Spring [illegible]ok—101 Ways to Lose Weight and Stay Healthy—which sells at grocery stores for 95¢—carried our full-page color of Spaghetti with Chicken Liver Sauce. Copy ran, "Surprise, Spaghetti! You've probably always thought that pasta was off limits for a dieter. But, look! Here's a king-sige serving, richly sauced for a modest 250 calories."

Good Food—February issue—ran color photos in a 5-page article entitled "Spaghetti with a Smile" . . . one of them picturing a youngster dishing out the spaghetti, with the theme of kids can create this meal.

Appealing to young homemakers are the romance magazines and the comparatively new publication of Lady's Circle which in addition to a monthly magazine publishes 4 cookbooks per year. The February issue featured "Lo-Cost Pasta Dishes" in a 4-page story with double-page photo and six recipes. The Spring Cookbook ran our color photo on the cover—Holiday Hamburgers and Noodles. Circulation 630,[illegible]0.

The February issue of Modern Romances ran a full page on "Cook with Macaroni, Noodles and Spaghetti," with seven recipes and our photo of Spaghetti with Clam Sauce. Circulation 752,337. And the May issue of True Confessions ran the food feature of "Spring Pasta Specialties" including our full-page color photo of Linguine Mediterranean.

Special Markets

And, we rang in macaroni products in the special markets of farm, Negro and military . . . January Progressive Farmer color photo-feature entitled "Pasta Warms Winter Meals." Circulation 400,000. March Soul Confessions—our full page color photo of Creamy Tuna Lasagne with recipe. Circulation 83,750. And the April issue of US Magazine, which again used our color photo of Spaghetti with Veal and Peppers in a feature entitled "Give a Fabulous International Pasta Party for Eight" plus 4 recipes. Circulation 50,000 (military family distribution overseas).

A leading sexist magazine—Playboy—ran an interesting feature on Zero Mostel in the April issue—for which we don't claim credit—but the curious among you will find it in our display of magazines—I'm announcing this simply to lure you to check out our exhibits.

Still in the hopper for the months to come are pasta features scheduled for American Girl, True Story, Seventeen, Young Miss (October issue), Ladies Circle (October issue), Woman's Life special issue of Money Saving Meals (Fall issue), Family Weekly Sunday Magazine (October issue). And if we really get lucky, the Jack Denton Scott story written specifically to editorial requirements of Reader's Digest.

Print Media

Typical of the 70 placements this 6-month period in Sunday Supplements and mid-week color pages is this one which ran in Mid-South, the supplement distributed with the Memphis Commercial Appeal. Headlined: "Macaroni—The Feather in an Economical Hat."

And concluding our print media penetration are voluminous results from 12 releases to dailies in the 219 major markets; plus 65 stories run by newspaper syndicates services such as Parade, Associated Press and United Press.

All of these breaks are here for you to see, divided into the four geographical sections of the country which I mentioned earlier.

Electronic Media

And in the electronic media we have had excellent coverage these first six months of 1974. The 10-minute telecast of the CBS Network show, Captain Kangeroo, ran first on January 16 and was repeated on the May 8th show. This was seen on over 200 stations nationwide. Cost of a one-minute commercial on this show is $1,500 . . . multiplied by 20, the total advertising value would be $30,000.

Thus far we have released two TV kits. The Spring kit entitled "Plan Ahead with Pasta . . . Spring Salads" was requested by 101 TV show personalities. Each kit contained product, slides, recipe sheets, script and a hand-painted salad bowl of Italian origin. The Summer kit is just out now, with the theme "Entertaining with Pasta." The prop accompanying this kit is a 10-inch Corning-ware skillet from their new "Spice of Life" line.

In addition to television, we have released two radio scripts each to 700 stations.

A third television kit is scheduled for release prior to National Macaroni Week. This will be themed to "More for your money with Macaroni" featuring economy recipes. The prop for this kit will be a spaghetti platter.

Our activity with Supermarket Consumer Specialists has been a release geared to the nutrition of macaroni products along with an offer of limited quantities of our recipe sheet entitled "Plan Ahead with Pasta." To date, we've sent out approximately 4,000 leaflets to such chains as Kroger, Jewel, Grand Union and Safeway for use as bag stuffers, newsletters, store-sponsored cooking demonstrations, etc.

National Macaroni Institute — Box Score

July 1, 1973 - June 30, 1974

Medium	Placements	Circulation
Consumer magazines — Women's Youth, Romance, Shelter, Farm, Negro, Spanish, Special Interest	134	420,053,928
Newspaper Syndicate and Wire Service Placements	134	1,016,177,914
Daily & Weekly Newspaper releases	24	624,000,000
Sunday Supplements	11	131,543,065
Color Pages	136	40,728,785
Negro Press release	8	997,264
Radio & Television releases	5	to 3,083 stations
Cooperative publicity	48	companies with 70 uses.
Trade releases	2	to 282 publications
Network Television & program kits	4	for 724 shows
New York Press Luncheon		Press Kit with three releases
Supermarket Consumer Specialists		Nutrition release to 50 chains
Extension Home Economists		One release to 1,900

Coming Up

Coming up in September will be our Eighth Macaroni Family Reunion, which has become a tradition to the New York Food press. Once again we will have it at Tiro a Segno. We have reserved the restaurant for Wednesday Luncheon, September 18.

And, of course, we're planning great things for National Macaroni Week which will take place this year October 3 to 12. Our Week theme will be "More for your Money with Macaroni" with a sub-theme of "Let's Get Down to Basics" . . . which will include variations of Macaroni & Cheese; Spaghetti and Meat Sauce; Buttered Noodles.

Merchandising, Italian Style

One Midwestern chain recently held a deli promotion at one of its stores. Called "Fiesta Italiano," the sale was a great success. According to the company newsletter, there was an "unusual and attractive display made with stacked barrels filled with tie-in items." Among the tie-ins: bread sticks, spaghetti, sausages, cheeses, artichokes, onions.

"Souper" Tuna Recipes

Tuna dishes made with Campbell's Tomato Soup and Campbell's Cream of Mushroom Soup are featured in a full-color page ad in September Family Circle and other magazines. Readers are invited to send in for a free copy of "Campbell's Souper Tuna Handbook," containing 12 kitchen-tested recipes. The ad carries recipes for Souper Tuna Salad Lamaze and Souper Tuna Noodle Bake.

Food Industry Trends and Developments

by Edgar B. Walzer, President and Editor-in-Chief, Progressive Grocer

THE marketing situation in super markets today—and tomorrow—is a direct result of last year's extreme pressures when ground rules changed in phases and stages, prices hit new peaks, product shortages developed, and were aggravated by panic buying which cleaned out shelves and the super market, long a symbol of unlimited abundance, began to operate in a climate of distortions. Returnables used to mean bottles. Last year it started to mean bags.

It became fashionable to say that an era had ended, and there is some irony in this. For years the industry tried to convince consumers that food is a bargain—but they didn't seem to recognize that fact until it came time to talk about cheap food in the past tense. As a matter of fact, several eras ended last year—and we'll discuss them in a moment.

At any rate, in 1973 consumers learned something about the food industry and the root causes of price increases. On the whole, they reacted with reasonable restraint to conditions which would have brought storms of protest a few years earlier. That has to be counted as a very large plus, but nobody knows how long the attitude of resignation will last—especially if prices continue to go up sharply and professional activists come back on stage.

Leveling Off

Meanwhile, without benefits of headlines another era seems about to end. After decades of constant, uninterrupted growth, the total number of super markets in operation is leveling off. Store openings and closings were almost in balance last year with three major chains alone shutting down some 500 units. Interviews conducted by Progressive Grocer with more than 300 chains and wholesalers indicate that new store construction plans are lower than in the past and suggest that a definite plateau may have been reached.

1971—38,900
1972—40,600
1973—40,960

On the other hand, super markets keep getting bigger. The averages tell only part of the story—more and more stores are opening up with 40,000, 50,000 or even more square feet of space. So even though the number of stores is flattening out, the "selling acreage" is still expanding—and more

Edgar B. Walzer

heavyweight class competition is shaping up. To anyone concerned with marketing, the increasing concentration of volume—and the new product mix within super markets—are of fundamental importance.

1970—22,000 sq. ft.
1971—26,600 sq. ft.
1972—28,500 sq. ft.
1973—32,000 sq. ft.

New Store Plans

In checking with chain executives about their new store plans, we asked which departments will be given relatively greater emphasis than before—and here is the answer. Non-foods, deli, and bakery are definitely the hot areas for increased development. It's not uncommon for the grocery department in today's new stores to account for less than 40% of store sales.

	% Chains Planning More Emphasis
Non-Foods	51%
Deli	51
Bakery	42
Flowers, Plants	12
Frozen Foods	10

In the non-foods category, planners are considering housewares, sporting goods, automotive products, hardware, clothing, linens, towels, home furnishings, garden supplies, paint, and toys. No one is going to say that the upcoming super market is bashful about competing with any other field of retailing. In order to understand the marketing implications of these trends, here are examples of what is happening:

In a town of only 5,500 in Northern Michigan, owner-operator Bill Lee has a 60,000 sq. ft. B & C Family Center with 27,000 items of general merchandise—an on-premise bakery, restaurant, prescription pharmacy, liquor and tobacco shops, community meeting room and leased-out beauty salon and barber shop.

Giant Foods, a corporately owned Malone & Hyde store in Nashville, rings up more than $8 million annually in its 50,000 sq. ft. of over-all space. The store devotes only 6% of space to non-foods, preferring to emphasize edibles: 11,000 grocery items, 1,000 frozens, 800 meats, 600 dairy, 250 produce, 100 fresh-baked goods and 175 deli-snack items. It serves a suburban area where income ranges from $8 to $15 thousand.

Handy-Andy's 43,000 sq. ft. entry into the Houston market does close to $200,000 weekly. It's geared to the special needs of higher income families and features boutiques for gourmet cookware, greeting cards and dinnerware and crystal. The store offers 400 wines, 300 cheeses, 500 gourmet items, a French pastry and bakery shop, plus a full-time hostess for information and guidance.

John D. McCartney's 43,500 sq. ft. super store in Tulsa had an opening week's volume of $310,000 and has settled down about $200,000 He stresses perishables: service meats, fish, bakery, delicatessen and restaurant. Ethnic and gourmet foods usually seen only on the two coasts are standard, and the staff includes a home economist.

Jake Harmon, a member of Associated Food Stores, Salt Lake City, opened a 68,500-foot beauty two months ago. Opening weeks' volume was 386,000, and he expects to level off at 250,000. Equipment and fixtures came to just under $1 million. Harmon's also has an on-premise hostess, something you're going to see a lot more of not only as a consumer-relations device, but as an active sales building operation. Some of these counselors have appointments weeks in advance and help plan large parties and club functions. You have to wonder whether they are adequately supplied with pasta suggestions.

Wine & Food Service

Wine is becoming a much more prominent category in States where super markets are allowed to sell it. The price is right, the margins are good, and the product is a natural for effective special occasion and holiday merchandising.

Food service is another area of expansion, particularly for the growing number of stores doing $100,000 a week or more. It's a counter attack against the fast food outlets which are taking business from super markets. Smitty's in Phoenix has four distinct approaches—counter service, pizza bar, take out foods and a sit down restaurant.

No other field of retailing can match the super market's traffic. Combined with the desire for one-stop shopping, this makes it possible for supers to go in any desired direction—as H. E. Butt is doing in Texas with a very upscale cosmetics and jewelry setup.

Sales Volume

The sales volume of today's super stores is enormous—cigarettes alone do almost enough to qualify as a super market. About 15% of the new stores opening today are geared for annual sales of $5 million or more, and that proportion will increase.

Sales Explosion in the "Super Store"*
(*$10 million annual sales)

	Estimated Sales Per Year
Paper Products	$280,000
Frozen Foods	620,000
Health, Beauty & General Merchandise	550,000
Candy	120,000
Cigarettes	420,000

With stores like these in the lead, plus the impact of inflation, it comes as no surprise that last year's **dollar** increase was the largest ever recorded. As a matter of interest, however, the 11.2% rise is far from a record. In both of the years following World War II, the percentage gains were more than twice as big.

1973 Grocery Store Sales (Billions)

All Stores	$113.3	+11.2%
Ind. Stores (10 or less)	56.74	+ 9.2
Chain Stores	56.39	+13.4

The chains did relatively better than independents, mainly because the small independent units are losing ground. On the super market level, and particularly in stores doing $40,000-and-up weekly, which now account for about half of all volume, independents more than held their own.

By themselves, the year's statistics look very positive, but they have to be considered in a broader context.

The food-at-home portion of the Consumer Price Index went up much more last year than retail food store sales. This has never happened before and the meaning is obvious. Consumers did trade down in 1973, just as they have been saying. They didn't buy the theoretical market basket on which the C.P.I. is based. Government figures say per capita food consumption dropped two per cent. And for the food industry still another era ended, the era of so-called "real" growth in which sales gains always outpaced cost-of-living increases. This explains why some people said they were glad they finished 1973 before it finished them.

Price Index Outpaces Sales Rise

16.3% rise in food at home
vs. 11.2% gain in grocery store sales

As usual, some parts of the industry did better than others. The ten largest chains, as a group, gained less than the industry in total, indicating again that massiveness may have its drawbacks, as well as its benefits. The difference between publicly owned and privately held chains—a breakout we have not often reported— can perhaps be explained by the greater freedom, flexibility, and reaction speed of companies that don't have to worry about the wording of the annual report. Independent super markets, probably most sensitive of all to local neighborhood conditions, maintained their traditional fast pace and came out ahead of the all-industry average.

Marketers tend to be dazzled by the chains—but it pays to remember that independents still account for more than half of the total food store sales.

Convenience Stores

The real star performers last year were convenience stores. They tacked on another fat sales increase and show no signs of slowing down. It's no wonder that many product manufacturers see outstanding opportunities in this area.

Sales Gains by Type of Store

10 Top Chains	+10.6%
Publicly Owned Chains	+11.7
Independent Super Markets	+13.4
Non-Public Chains	+18.0
Convenience Chains	+22.5

The little dynamos continue to boom along, adding stores and entering new areas. Although their share of U.S. sales is still modest, their consistent growth seems to support predications that they will more than double that share by the end of the '70s.

Convenience Store Growth

	1972	1973
Stores	17,600	20,300
Sales (Millions)	$3,500	$4,350

What makes this pattern even more interesting is the fact that convenience stores operate on substantially higher margins than their big brothers. They simply don't choose to be price competitive—it isn't their thing, and perhaps the best insight into the business is the comment that bad weather has a greater effect on their sales than the nearby presence of a 24-hour discount super market. The continued growth of these stores tells us something about the consumers' willingness to trade off price for convenience—even when the food budget is under considerable strain. By the way, the macaroni margin in Convenience Stores is 37.2%.

Wages & Automation

This is what keeps owners and managers awake at night, wages continue to creep up as a per cent of sales. The rate of increase is somewhat smaller than it has been in recent years, probably again due to rapidly rising store volume, but labor costs remain a major problem. One way or another they affect almost every operating decision.

Super Market Wage Expense

	1972	1973
Independent	8.2%	8.4%
Chain	8.6	8.8

Some people have started speaking about wages per minute instead of per hour and the number goes as high as 17 cents per minute. If you like round numbers, store wages for the whole industry are now close to $10 billion—up about 35% just since 1970.

As an antidote, the industry is moving rapidly toward automation. The electronic front end is no longer just around the corner. It's here. The Universal Product Code is being adopted faster than anyone would have imagined . . . and it means far greater precision in ordering, inventory control, shelf space management, sales analysis, and merchandising. Broad scale use of scanners is still a few years off but electronic cash registers are going in very quickly. They not only speed up the checkout operation, but keep track of coupons, calculate taxes, improve cash control, and provide a mass of departmental product movement data. These registers will ultimately be tied in with scanning devices which read the product code and with in-store mini computers. When that happens, the store manager will have all the information he needs to make quick tactical decisions. For example, price changes can be put through instantly—without remarking the merchandise. Another interesting use is to track the imput of out-of-stocks on sales of other items—such as private labels in the same product category. One big question about automation is how it will affect the job of manufacturers' salesmen? Interestingly, their own answer is very positive. They see a greater premium being placed on ideas and imagination, and

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Food Industry Trends

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they think teamwork with store personnel will be improved. Their role will be to provide information and suggestions to make the computer record larger sales and thus call for bigger re-orders—perhaps automatically. If all this sounds like a brave new world—it is! And all the systems are go.

Effect of Computerization in Stores According to Salesmen

Mdsg. Ideas More Important	1
Initiative More Important	2
More EDP Knowledge Needed	3
Better Salesmen/Store Teamwork	4
Major Changes in Training	5

What Will Consumers Do?

This is the big question for everybody in the food industry. Will consumers remain reasonable and try to "make do" . . . or will the pressure of higher prices, product shortages, and other stresses cause them to become frustrated and explode? That's particularly germane for the macaroni industry—because price-demand elasticity is really being tested right now.

To see how the wind is blowing, we asked the Home Testing Institute—a highly respected national research organization—to give us an up-to-minute reading of consumer thoughts and actions. The findings you are about to see reflect attitudes in the first quarter of this year.

Who's to Blame for Rising Food Prices?

First, here is how they have shifted the blame for higher prices since the same survey was made exactly one year earlier. The government is now far out in front, having taken some of the heat off food manufacturers and labor unions. This sentiment is particularly strong among housewives in the East, those under 35, and in the lowest income group.

	% Housewives Naming Now	Last Year
Government	34%	16%
Labor Unions	19	30
Food Manufacturers	18	29
Food Wholesalers	13	13
Transportation	5	4
Farmers/Cattlemen	5	2
Large Chains	4	3
Super Market Operators	2	3
	100%	100%

The consumers are saying very plainly that the government's policies and programs in the past year not only failed to help, but actually caused prices to go up.

Food wholesalers, we think are used here as a catch-all for the mysterious "middleman" often mentioned in the media. Few people ever meet him, but everybody dislikes him.

Retailers again get very little blame. Last year that came as a rather unexpected but pleasant surprise, and apparently nothing happened in 1973 to change the consumer's mind.

Apart from pointing the finger at government consumers made some strong changes in their buying habits last year. These figures confirm what many operators have observed with respect to meat buying. Housewives cut back on both quantity and quality. It might be pointed out, here, that the pet population was not asked to make similar sacrifices . . . 1973 was a record year for the most expensive gourmet dog and cat food items. As for their bargain hunting, shoppers seem to be more interested in featured specials than in shifting to private labels.

What Consumers Are Doing

	% Housewives Reporting Very Much	Some	Little/None
Fewer Meat Purchases	36%	39%	25%
Cheaper Meat Cuts	26	39	35
More Attention to "Specials"	57	31	12
Switch to Pvt. Brands	22	33	45

There may be an important merchandising clue here because the energy crisis strongly affected the way many people shop. At the height of the gas shortage, between one-third and one-half of the housewives said they were going out less often, buying more per trip, and using just one shopping center. They also avoided Saturday afternoons, when stations were apt to be closed or out of gas, and cut down on trips to drive-in eating places. As their shopping becomes more concentrated, a store's ability to attract them for that one big trip becomes even more critical . . . and that's where merchandising will make the difference.

Effect of Gas Shortage

	% Reporting
Buy More per Trip	47%
Use Single Shopping Center	47
Avoid Saturday P.M.	38
One Trip per Week	37
Less Drive-in Eating	34

The net impact of the fuel crisis was a very dramatic reduction in weekly trips to the food store . . . amounting to 25% for the average household. Two-thirds of all families come down to no more than two trips a week. Even though the problem has eased, they haven't returned entirely to the old schedule. This means, of course, that transactions are now larger . . . and that the effect of gaining or losing a customer is correspondingly greater.

Fewer Food Shopping Trips

3.04 trips per week in 1973
2.28 trips per week in 1974

Still on the subject of energy and shortages, some products received a buying boost. We saw a move toward lower-wattage light bulbs . . . and a greater interest in so-called "hearty" foods like hot cereals and soups. Sociologists and others who like to keep track of such things may now want to chart the relative progress of hearty foods and party foods . . . and perhaps read some significance into the results.

What Consumers Are Doing

	% Making or Planning Increased Purchases
Lower-watt Bulbs	46%
"Hearty" Foods	44
Batteries	30
Flashlights	21
Fireplace Logs	17

It's probably fair to say that consumers have rarely been more uneasy or uncertain in the super market. They read about on-again-off-again shortages . . . they see prices changing almost weekly and they don't quite know what to do about it. As a result, their buying behavior has become much more volatile. We've seen that they are ready to change long-established eating and shopping patterns almost overnight. For smart merchandisers, this is nothing less than a license to hunt. Whether you call this a breakdown in traditional loyalties or a breakthrough in the perception of value—it is a marketing development of great importance.

What's Happening to Macaroni?

Now let's see what is happening to the macaroni business in these hectic times.

Your dollar volume went up a whopping 25% for the year 1973—a record matched by very few product categories, and you're all familiar with the basic reasons. Taken by themselves, the gains look wonderful—but in the context of industry conditions one is tempted to comment: "How bitter-sweet it is."

1973	+25%
Last 12 Weeks	+46

Even more remarkable, for the last 12-week period of 1973 macaroni prod-

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Food Industry Trends

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uct volume was 46% higher than in the same period a year earlier. That put you in first place—No. 1 among major grocery product classes in per cent of growth at year's end. But a lot of people were holding their breath, to see how tonnage would hold up under continuously rising shelf prices. On the favorable side: — there were research findings which showed many pasta dishes gaining in popularity. According to the MRCA Menu Census, the Serving frequency of spaghetti with sauce went up 13% in the five-year period ending last year—macaroni and cheese increased 35%—and pasta salads 41%. On top of this, hot dishes such as macaroni with meat or chicken gained 31% —and noodles with meat, chicken, or tuna were served 67% more often.

Greater Popularity

Spaghetti & Sauce	+13%
Macaroni & Cheese	+35
Pasta Salads	+41

It's clear that your products—alone or in combination—have enjoyed steadily expanding usage over the years—and this undoubtedly helped you withstand the price crunch when it hit. But some clouds are beginning to gather.

Here are some statistics as of only a month ago. Looking at the entire year ending in mid-May, we see that dollar sales are up 40%, while poundage is 6% above the previous level. It seems that the appeal of your products is strong enough to counteract the price strain. However, when we look more closely, some signs of softness begin to show up. In the 12-week period ending in mid-May, with dollar sales booming along 46% higher than a year ago, actual tonnage moving out of the distribution system was off by 1.8%. And as we zero in even more tightly the slippage is there to be seen. Just how you interpret these figures is a matter of individual judgment but it appears the string may be running out. We have reached a fork in the road, and perhaps the time has come to consider creative new strategies with both consumers and the trade.

Warning Signals

May '74	$	Lbs.
Year	+40%	+6.0%
Last 12 Weeks	+46	—1.8
Last 4 Weeks	+45	—2.0

Here, now, is an advance look at data we will publish in Progressive Grocer magazine soon. It's our second annual report on product movement in the big new stores which are setting the pace today and establishing the pattern for the operations of tomorrow.

Macaroni Products: '74 Super Store Performance

Items	43
Unit Sales	1,071
Dollar Sales	$395
Dollar Margin	$ 71

Our composite store does just under $140,000 a week. It carries 43 items of dry macaroni products—moves 1,071 units every week, for a sales total of $395—earning a very respectable margin of $71.

These are bigger numbers than we grew up with—but we will all have to get used to working with them. And that's another reason why new strategies are appropriate and welcome at this time.

When it comes to merchandising, we think your opportunities are very good . . . first of all because your margins are well above the overall 15.9% for the grocery department of our composite store operates. Your category produces more dollar profits than all syrups, ground coffee, baby foods . . . cake mixes, or pourable salad dressings . . . and more than any two canned fruits combined. Another plus is the great variety of related items which can be tied-in with macaroni products. Some of your trade advertising has pointed out that every dollar of pasta sales triggers the purchase of seven dollars worth of related items—and that's a very powerful message. It makes more sense than ever in a time of fewer shopping trips . . . because retailers know they have to "impulse" the customer as much as possible.

And then, of course, everybody is trying to stretch the food budget—which means much greater interest in meals and dishes that can be prepared at relatively low cost. You have a great story to tell here, in terms of recipes, serving suggestions, and menu planning. Consumers are looking for this kind of help—and we think you will find retailers much more willing to use merchandising suggestions and materials which promote economical, yet tasty and nutritious meals.

Merchandising Revival

We see strong signs of a revival in merchandising interest in the super market. Together with the consumer trends which are running in your favor —such as budget-mindedness, willingness to experiment—and improved understanding of food values—it adds up to an unusually attractive opportunity to get more prominence at the point of sale.

Just to underline the continuing importance of strong merchandising programs, on their most recent trip to the store, more than seven out of ten shoppers bought something they hadn't planned to buy . . . and a third of them bought an item they had never bought before. On top of that, the majority redeemed one or more coupons. This is a big increase over the previous year—and probably reflects bargain-mindedness, as well as the wider availability of coupons in store advertising.

The Importance of Merchandising

Made Impulse Purchase(s)	71%
Bought Item(s) First Time	32
Used Coupons	59

Well, if all this is true, how come there isn't a field day for point-of-sale materials?

Here is one answer: Seventy per cent of the salesmen calling on super markets say they are up against moderate or severe limitations on the work they can perform. Sometimes it's due to strict chain policies . . . and other times to restrictions laid down by clerks' unions. In either case, it cuts down placement of display materials. Another problem is that salesmen are pretty bearish about getting much stuff up in chain super markets. They agree there is broad interest at independent stores . . . but when it comes to chains, they see little hope. Their viewpoint could hardly be clearer. But that's not the way managers see it.

Attitude Toward Merchandising and Display Materials According to Salesmen

	Chains	Indep.
Generally Interested and Receptive	13%	[illegible]
Generally Disinterested	17	[illegible]
Opposed Due to Store Policy	41	[illegible]
Selective Depending on Usefulness	29	[illegible]

What Owners and Managers Say About Merchandising and Display Materials

	Chains	Indep.
Very Interested, More Should be Offered	23%	[illegible]
Very Interested, Enough is Offered	13	[illegible]
Moderately interested	41	40
Opposed Due to Policy	19	[illegible]
Not Interested	4	2

Their message about merchandising and display material is, "Keep 'em coming." And except for the 19% who reject everything because of company policy, chain store managers are just about as interested as the independents are. Certainly they are far more receptive than most salesmen seem to realize. Apparently the men who meet the customers are very much aware of the power of good point-of-purchase displays.

Unfortunately, there is one major problem and here it is, spelled out loud and clear.

Usefulness of Materials According to Store Owners and Managers

	Chains	Indep.
Most Materials Are Useful	16%	12%
Most Materials Are Not Useful	31	41
Usefulness of Materials	53	47

Great quantities of material produced by manufacturers today simply isn't considered useful by owners and managers. Much has been written about the "waste" in point-of-sale pieces, and these findings may show the cause—a lot of the stuff just isn't conceived, designed, and produced in a way acceptable to the retailer. So the biggest reason for lack of usage isn't disinterest —but rather. shortcomings in the material currently available.

And this is what they want . . . dump bins, pick-and-choose kits, seasonal banners, base wrap . . . take your choice. It looks like the door is wide open for anyone who has the right kind of material. Don't let anybody tell you there aren't plenty of opportunities for merchandising support. And smart companies are cashing in on them.

Types of Materials Wanted

	Independent Managers	Chain Managers
Dump Bins	83%	72%
Store Kits (theme banners, posters, signs, etc.)	80	59
Seasonal Theme Banners	68	57
Shelf Signs	48	21
Consumer Promotion Tie-ins (contests, coupons)	47	43
Base Wrap	47	63
Preconstructed Units	44	41
Pole Type Units	42	34

Kraft, for one, knows how to do it. Here are the dump bins everybody is ready to use . . . plus a canopy to dress up the display. And notice the tie-in with crackers . . . one of the retailers' favorite related items.

Seasonal materials are always welcome . . . at the right season. There's nothing astoundingly creative here . . . just a practical piece and it gets used.

It is probably fair to say that the food industry has rarely operated in a period of so many changing methods and conditions. The events of the past year—many of them unprecedented, and even unthinkable, shook the industry to its roots. But now a new and seemingly stronger system is emerging —bringing with it several good reasons for optimism—and some excellent opportunities for innovation.

Reasons for Optimism

Better Consumer Understanding
More Realistic Margins
Gains in Efficiency

We can be optimistic because people know a lot more than they used to about how and why prices go up—and they're beginning to understand that it isn't the food retailer's fault. Because of this, super markets have been able to get away from the absolutely ruinous price warfare of recent times, and begin to reestablish more realistic margins. Many industry problems were the result of profitless volume, and what's happening now is healthy—not just for super markets, but for everyone doing business with them. In addition, under crisis conditions, many companies have been able to find economies by tightening up their operations and eliminating unproductive practices. These benefits will continue.

As for innovation, perhaps the most promising opportunities are in closer retailer-manufacturer cooperation. New concepts and approaches can be developed in joint planning, logistics, use of promotional allowances, introduction of new items, and development of sales forces.

Progress can be made in matching the super market and its merchandise to the particular needs, wants, and interests of the local neighborhood.

There is plenty of room for fresh thinking on the subject of pricing . . . on a category, department, and total store basis . . . and during promotional periods.

The advent of the universal product code and the automated front end opens a whole range of opportunities for creative analysis and application of the sales data which will become available.

Retailer-Manufacturer Relations
The Many Consumer Markets
The Art of Retail Pricing
Merchandising Sales Data
Shopper Interest, Satisfaction

And certainly much can be done to capitalize on the consumer's greater awareness of nutrition and food values. There was a time when the corner grocer was the neighborhood food expert . . . and there is no reason why that role can't be played again by the super market operator . . . on a grander and more professional scale.

With all the troubles the food industry has experienced, it's easy to forget that it **is** the country's most vital and powerful business. It **does** have all the tools and talents needed to meet the present challenges. And it will find ways to improve its service to the American people.

The old eras are phasing out—but a more innovative, more precise and more sophisticated merchandising era is beginning.

Fewer Deals

More than half the manufacturers polled by Supermarket News at a supplier-distributor briefing at the National Association of Wholesale Grocers convention said their firms would offer fewer trade deals and promotions this year. A solid minority said their companies would offer about the same number of deals, while a few claimed more are scheduled.

Cents-off deals will be determined by retailers and consumers, not by manufacturers, stated panelist Ed Thorton, Colgate-Palmolive, New York. There seems to be somewhat of a trend back to cents-off, he stated.

Almost all wholesalers in the audience accept cents-off but apparently the device is not favored by distributors.

In-ad Coupons

In-ad coupons have replaced cents-off labels to a large extent, according to Leo E. Shepherd, director of corporate sales for General Foods. He pointed out that many stores cannot take advantage of ad-coupon offers since they do not advertise.

Wholesalers would like to extend the closing dates for deals and they want floor-stock protection when they come in late, several speakers stated.

David A. Lighthall of Ralston-Purina said his company designs deals and promotions easy to conform to, and thus make it easy to buy from the company. He said promotions have been simplified, mentioning an off-invoice stocking allowance with no performance required and off-invoice letter of intent or bill-back. Ralston's promotional activity for the balance of the year should be on the same level as a year ago.

Ragu' Plugs Economy

"How to serve your family a good and hearty hot meal without using up your whole budget" is the message in a full-color, full-page ad for Ragu' Old World Style Spaghetti Sauce, appearing in September Family Circle and Woman's Day. The ad promotes the basic—and economical—pasta and sauce meal. Readers are invited to write Ragu Foods, Inc. for a free recipe booklet.

MACARONI PRODUCTS - retailers report higher volume, more shelf space for bulk pasta, less for convenience dinners

Chain Store Age Sales Manual, July, 1974

IT was the year when shoppers discovered, rediscovered or expanded their use of pasta. And during 1973 some consumers also found that they could cook a macaroni-based meal more economically—if not quite as conveniently—than they could by using a convenience dinner or add-meat product.

The latter still comprise important category segments, but there has been a considerable shakeout in the number of suppliers producing them,and in the number of convenience-type items carried on supermarket shelves.

An official of the National Macaroni Manufacturers Assn. offers this explanation for the cooling off of add-meat (fish and poultry) items: "They were hot for three years, so they were bound to level off anyway. But in '73, when the meat boycott helped the entire pasta category as consumers looked for alternate protein sources, these items began to decline because they use meat—the then symbol of inflation."

Dinners Offer Convenience

He adds, "For a few suppliers, they will continue to be a factor, because convenience will always be important to many consumers. Of course, many of our suppliers stress in their ads that just about any form of pasta is conveniently prepared."

A supermarket executive whose company previously carried numerous add-meat brands, notes, "We found that all we needed was one or two, and a private label." He adds, "Some of these items we couldn't get now if we wanted them, as they quickly became casualties in an over-populated category—truly classic cases of me-too-ism."

A macaroni maker who already has a wide-ranging product list, tells why he resisted the temptation to enter the add-meat derby: "The packet of seasoning inside the package is the main thing differentiating this kind of product from the one the shopper can make from scratch. Some of these additives are very good indeed, but we figure that it could be difficult to satisfy a mass market with a predetermined flavor—especially in an era when creative cooking is as important a factor as convenience—especially with younger people. The 'in' thing seems to be for them to experiment with their own seasoning and sauces."

Soy Products

In the face of resistance to meat last year, the pasta category also made room for complete meat-substitute items combining wheat and soy derivatives, plus at least one produced by a pasta maker that was not pasta at all. An entirely soy product, it ended up in some macaroni departments, although some chains are carrying it in their meat departments.

One producer of a strictly soy derivative item, Creamette Co., Minneapolis, explains that its Protein-ettes has appeared in both departments "because nobody knew where to put it." A marketing executive notes, "It's an extruded product, but it's not pasta; however, its association with our name also accounts for the division of opinion over where it belongs."

He describes it as "a complete meat analogue, with no cholesterol and no animal fat," and says it is now available in most of the country (except Eastern markets such as New York where Creamette is not represented). He views the product's future as tied to how well consumers can be educated to its benefits. How is it performing so far?: "Some days I want to chuck it out the window, and some days I'm happy as hell with it."

Superoni

A similarly mixed review was offered by a maker of an actual pasta product combining wheat and soy derivatives. An executive of Prince Macaroni Mfg. Co., Lowell, Mass., reports that Superoni (a product including wheat germ, wheat gluten and soy) "does well where we can explain eyeball to eyeball the tremendous savings and good protein involved; it can serve as a complete fish, meat or poultry substitute."

Retail volume for the entire soy protein product is difficult to estimate as much of it is in the test stage. But there are high hopes for it, with some government and academic sources predicting soy items will comprise at least 10% of supermarket meat volume by 1985. As for soy products found near the dry packaged dinner section, the ones doing best are those the supplier has "stayed with, and continued promoting to the consumer," a chain buyer notes.

So far, the strongest promoter to consumers of a packaged meat extender has been Central Soya, supplier of Mrs. Filbert's Plus-Meat. A Nabisco spokesman said the company also has plans for a retail packaged extender. But much of the product and promotional thrust to date has been toward meat departments, encouraging them to mix a soy product in with a portion of their chopped meat production.

Pasta Is a Bargain

Meanwhile, the entire industry seems to have done a good job in convincing consumers that, despite recent price rises, pasta is still a bargain, as well as an important adjunct to the creative cooking-casual home entertainment trend. This trend has seen the burgeoning of wider items for the popular practice of stuffing—including manicotti, lasagne, canelone and large shells, even old-fashioned dumpling noodles.

U.S. pasta consumption rapidly went from 7½ to 9 lbs. per capita (in 1973), and the 1974 rate through the Lenten season was 11 lbs. After this time, the traditional movement slowdown occurs, at least until summer when pasta's use in salads and other quickly prepared meals helps pick it up again.

Outlook Hopeful

Will the industry be able to continue meeting the heavily increasing demand? The outlook is hopeful, as a record wheat crop is in sight, and prices have declined from the record per bushel costs of last year.

The macaroni trade association official notes: "As far as the supply of durum wheat goes, we think we're going to squeak through. When the price went from $2.90 to as high as $9 a bushel last year, we were quite perturbed, especially as export activity made us think we'd be left without adequate supply."

He adds: "But at $9, sales for uncommitted destinations were scared off. There won't be a new crop until August or September, but right now it looks like we'll see a 20% increase in supply. Even at the lower prices—and they've been down to $5-$6 per bushel, and more recently at $6-$7 in a highly volatile market—exports are still not as great as they were expected to be, and this has been good for our domestic suppliers."

Despite the instability of the wheat market, the industry had a good production year in 1973 with durum mill grind up 12% over the previous year, and the tonnage increase estimated in the 15%-20% range.

Retailers uniformly report higher pasta volume for last year over 1972, and increases in either overall space allocation for the category, or in alignment to give more room for bulk items at the expense of convenience dinners.

Packaging

In packaging, the trend continued to greater product visibility through increased use of flexible packaging film. But cartons continued to have their proponents, including major pasta makers like C. F. Mueller Co., Jersey City, N.J. (the supplier with the largest national share of market in this highly regionalized industry. It is estimated that last year it took seven pasta producers to capture 51% of the national market).

Some, who prefer flexible packaging, are attempting to obtain the best of both worlds through designs that combine a high degree of product visibility with maximum brand identification. Skinner Macaroni Co., Omaha, Neb., recently joined the two requirements in a completely redesigned packaging format for its line of 64 products.

Merchandising

In the merchandising area, suppliers like to point out what outstanding tie-in opportunities the category provides. They point to research showing that each dollar spent on pasta triggers the sale of $7.22 in items used with it including dairy, meat, fish, poultry, vegetables, herbs and spices, sauces and condiments, pickles and olives.

Mueller recently proved the tie-in possibilities with what it termed "the world's largest display of spaghetti products and sauces," at a K mart in Hollywood, Fla. There, an entire display of 800 cases (containing 14,500 packages of Mueller's thin and regular spaghetti, vermicelli and the company's new linguine) plus 800 cases of Louie's Sauces containing 9,600 pint jars, sold out in four weeks, according to Herman Jenkins, store manager.

Pasta's long-term outlook at retail would seem to be excellent. As one chain grocery merchandiser puts it, "Macaroni will always have a market, but it does especially well in difficult economic times, and it looks like a high rate of inflation will be with us for quite a while."

He adds the proviso: "If meat prices continue to decline, you will see less rapid growth of pasta (and rice) than we saw in the post-Lenten season."

Another industry executive states that a major reason for pasta's development in recent years, is that it has been gaining acceptance in every section of the nation. "Heaviest consumption is still in the East," he points out, "where you have more population and Italian influence, but the truly ethnic market is very small now."

He notes further, "Although most Italian-Americans have been assimilated into U.S. society, the ethnic connotation of a people with a great cooking tradition is still useful, namely: If Italians eat this, it must be good."

Japanese Spaghetti Vendor

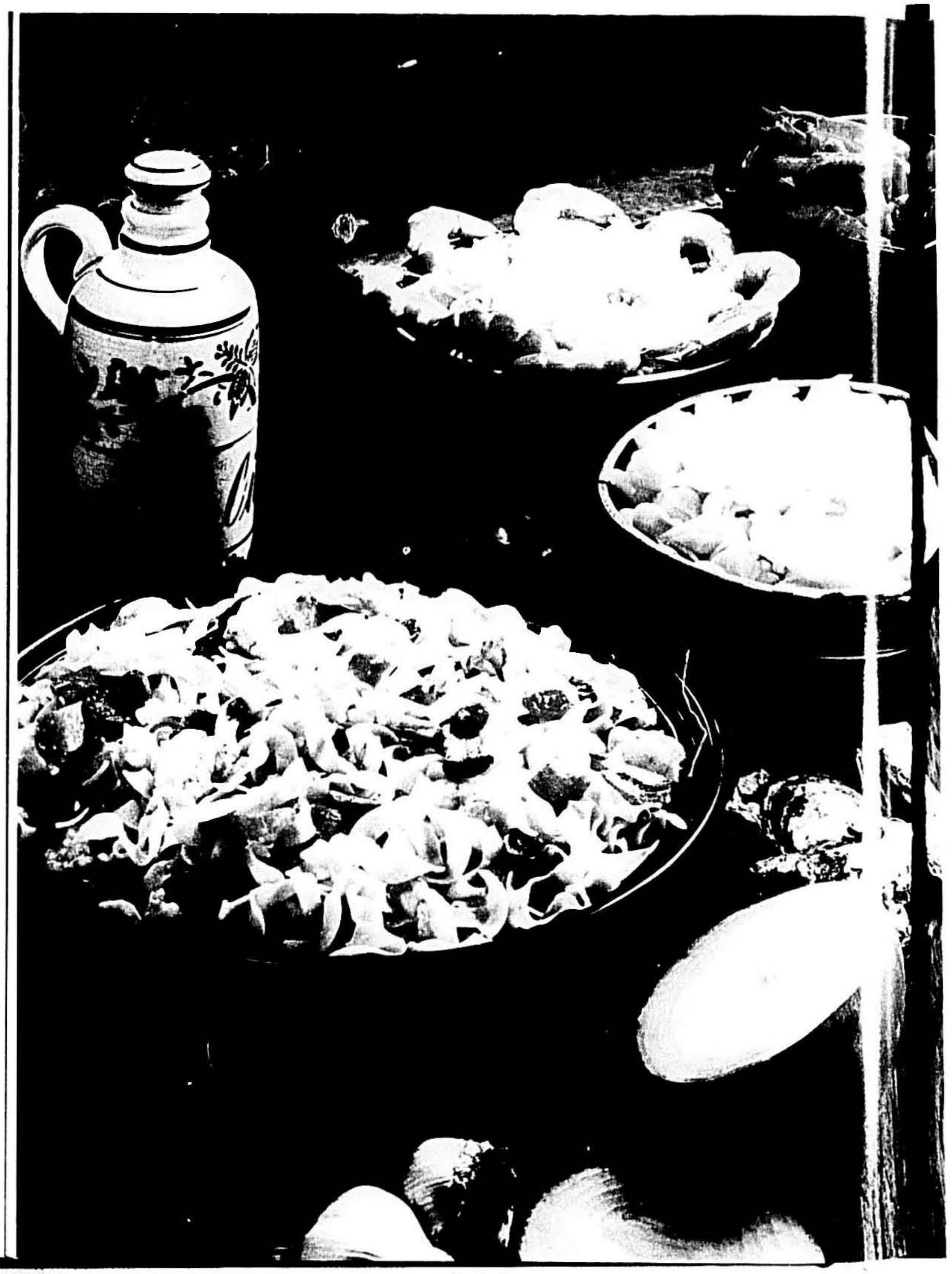
Kawasaki Steel Corp. says in Tokyo that it will introduce in October an automatic vending machine that can cook up and serve a steaming dish of spaghetti and meat sauce in 27 seconds. A packet of spaghetti moves from refrigeration compartment into cooker, where it's boiled in water. At the same time, a portion of meat sauce is heated. Spaghetti and meat sauce are then combined and pushed out the door to customer.

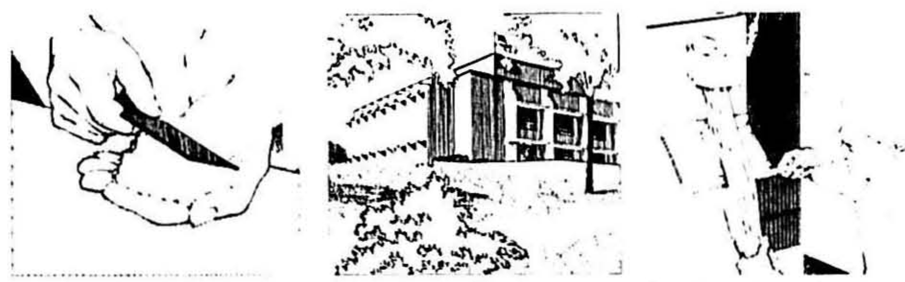
Unit Movement: The following chart shows each macaroni/pasta products category's share of total unit movement measured in cases per store per week in standard case quantities of 24 units each. This data is based on a random simple of supermarkets that were able to furnish detailed item information.

Category	Share of Unit Mv.	Estimated Cases/Week
Macaroni	26.2%	10.0
Elbow	10.2	3.9
Other	16.0	6.1
Spaghetti	24.4	9.3
Regular	15.6	6.0
Other	8.8	3.3
Noodles	16.0	6.1
Flat	14.4	5.5
Other	1.6	0.6
Macaroni Dinners	15.8	6.0
With Cheese	14.1	5.4
Other	1.7	0.6
Noodle Dinners	1.3	0.5
With Meat	0.8	0.3
Other	0.5	0.2
Spaghetti Dinners	1.6	0.6
With Meat	0.5	0.2
Other	1.1	0.4
Add-to-Dinners	11.3	4.3
Pizza Mix	2.0	0.8
All Other Pasta Products	1.4	0.5
	100.0%	38.1

MACARONI/PASTA PRODUCTS: 1973 Performance $1 Million Supermarkets

	SALES		PROFIT		ASSORTMENT	GROSS MARGIN
	% of Dept. Sales	Dollar Volume (Millions)	% of Dept. Gross Profit	Gross Profit Dollars (Millions)	Items/Brands Sizes at Warehouse	Avg. Gross Margin (% of Retail)
Macaroni	23.3	$121.8	22.4	$ 22.8	30	18.7
Elbow	9.0	47.2	8.3	8.4	8	17.8
All Other	14.3	74.6	14.1	14.4	22	19.3
Spaghetti	22.4	116.7	20.8	21.2	18	18.1
Regular	14.3	74.5	12.9	13.2	11	17.7
All Other	8.1	42.2	7.9	8.0	7	19.0
Noodles	16.2	84.6	17.0	17.3	23	20.5
Flat	14.6	76.1	15.3	15.6	19	20.5
All Other	1.6	8.4	1.7	1.7	4	20.2
Macaroni Dinners	11.0	57.2	9.4	9.6	6	16.8
With Cheese	9.4	48.6	7.6	7.8	3	16.0
All Other	1.6	8.6	1.8	1.8	3	20.9
Noodle Dinners/ Mixes	3.1	16.1	3.5	3.5	6	21.3
With Meat	1.2	6.2	1.3	1.3	2	20.0
All Other	1.9	9.9	2.2	2.2	4	22.2
Spaghetti Dinners	1.8	9.6	1.8	1.8	4	18.9
With Meat	0.8	4.4	0.8	0.8	2	18.0
All Other	1.0	5.2	1.0	1.0	2	19.6
Add-to Dinners	18.4	96.2	21.4	21.8	22	22.7
Pizza Mix	3.5	18.4	3.4	3.5	3	18.9
All Other Pasta Products	0.3	1.5	0.3	0.3	7	20.0
TOTAL	100.0	$522.1	100.0	$101.8	119	19.5
% of total store volume . . . 0.72%						
SAUCES:						
Spaghetti Sauce	25.4	$121.7	21.3	$ 18.9	27	15.5
Meatless	15.1	72.2	12.2	10.8	16	15.0
With Meat	9.4	45.0	8.0	7.1	9	15.8
With Clams	0.9	4.5	1.1	1.0	2	21.2
Dry Spaghetti Sauce Mix/ Seasoning	2.0	9.4	3.0	2.7	3	28.5
CANNED MEAT AND SPECIALTY FOODS:						
Italian Dishes	22.1	$217.3	24.1	$ 40.0	22	18.4
Spaghetti w/meat	7.0	69.5	8.1	13.5	7	19.4
Spaghetti other	4.7	45.9	4.5	7.5	5	16.4
Macaroni /meat	2.2	21.7	2.4	4.0	3	18.7
Macaroni other	0.8	7.5	0.9	1.4	1	18.9
All other Italian	7.4	72.7	8.2	13.6	6	18.7





Hard Times Mean Good Times For Pasta Products

from Progressive Grocer, July 1974

MACARONI products seem to have everything. They're symbolic of an amazing number of the major trends affecting the super market's livelihood. Consider:

Inflation: Shoppers always turn to pasta during hard times, and family food budgets prove that such times are at hand. SAMI figures for 1973 indicate a 25% jump in dollar volume for pasta last year, and an even more remarkable 46% rise during the last 12 weeks of the year. Inflated materials prices shared much of the blame, and there have been several recent rounds of retail price hikes.

Shortages. Durum wheat, pasta's prime raw material, has fluctuated wildly in price over the past year. Wheat is, of course, one of the most famous shortage-hit commodities. Sample result: durum jumped from $2.90 a bushel early last June to $9 by mid-July, settling down eventually to around $5.

Consumer demand shifts. Partly to economize and partly to expand her repertoire, the U.S. housewife has in recent years been turning to pasta products as all-seasons foods. This must be a winning combination, since despite price increases demand has held at excellent levels. Trade sources also believe pasta has been a big benefactor of the you-add-the-meat prepared dinners approach. Many consumers, these sources report, have switched from the more costly prepared dinner mixes to plain macaroni products, adding meat and their own seasonings, thereby saving the difference. Reports one industry expert: "We haven't had a better year since meat rationing during World War II."

Profit potential. With grocers scrutinizing the products they sell as never before in attempts to weed out unproductive ones, pasta is gaining new stature with the trade. One reason is consistently above-average margin levels while the category continues to grow. Progressive Grocer's composite super store, for example, earned almost 25% more margin dollars from pasta in just the past year. Another reason: the galaxy of related-item opportunities pasta products represent. A study done more than a year ago shows that every dollar is pasta sales generates another $7 of tie-in purchases. Biggest such opportunity categories: dairy products (cheese), canned meat, fish, canned poultry, vegetables, herbs and spices, sauces and condiments, pickles and olives. Multiple placement of pasta items is also growing as a merchandising habit, further expanding the opportunities.

Diet-consciousness. The eat-pasta-and-get-fat fear seems to be passing from the scene with better-educated consumers. Manufacturers have helped measurably by presenting their products' case forcefully with a twin theme: good nutrition via a cheap source of protein, and controlled calories thanks to recipes that show how.

The consumer herself is perhaps the most important factor of all in the new image of macaroni products. This is evident when you compare actual foods usage as measured by the Market Research Corp. of America's Menu Census. Contrasting results of the latest (1972/73) Census with the one made five years earlier (1967/68), the combined trend toward economy and more foreign type dishes comes through clearly. While total meat consumption dropped slightly, hot dishes containing meat and pasta jumped as much as 67%. Foreign hot dishes as a category rose an impressive 59% in five years, while hot Italian dishes made the biggest leap of all—leaping by 105%. And measured against all vegetable salads, pasta salads enjoyed by far the greatest growth.

See data on items carried, dollar sales and margin in Table A.

TABLE A

		Units		Dollar Sales		Margin		
	Items Carried	Weekly	% to Total	Weekly	% to Total	$ Weekly	% to Total	% Margin
DRY MACARONI PRODS.	43.3	1072.1	(0.4)	395.20	(0.3)	71.14	(0.2)	18.0
Macaroni	16.3	539.3	50.3	166.97	42.3	29.95	42.1	17.9
Noodles	12.2	186.1	17.4	78.27	19.8	14.37	20.2	18.4
Spaghetti	14.8	346.7	32.3	149.96	37.9	26.82	37.7	17.9

Helping Stir Up New Adventures In Home Cooking

AMERICANS are rediscovering the art of home cooking. Sales of cookbooks are booming. Gourmet cookware is selling in unprecedented numbers. Formal classes designed to upgrade home cooking skills are springing up all over the U.S.

Hand-in-hand with this trend towards distinctive food preparation, sales of condiments—gravies, meat sauces, barbecue sauces, seasonings, flavorings, extracts and spices—have jumped markedly over the past year. With the cost of an evening out at a restaurant becoming prohibitive for many families, housewives appear to be more willing to spend a little more per dish for an unusual taste or garnish, particularly for home entertainment.

Italian Sauces Zoom

The overall condiment/sauce category increased in dollar volume 7.8% during 1973, based upon SAMI figures of warehouse withdrawals, reaching $734 million. By far the outstanding performer in the category—Italian food sauce skyrocketed 22.1% in dollar volume. Since this item recorded only a small price-per-pound increase during the year, its dollar volume takes on greater significance. Only catsup sales ($200 million, up 5.3%) ranked higher than the $127 million rung up in Italian food sauce.

Other bell ringers in the condiment/sauce group include tartar sauce (up 15.4% in dollar volume), vinegar and cooking wine (11.4%), miscellaneous sauces (9.7%) and meat sauce (9.5%).

An MRCA Menu Census measurement of food servings bears out SAMI statistics of increasing purchases in the condiment/sauce category. A comparison of an average two-week period in 1972/73 with a similar interval in 1967/68 indicates the strong contenders: sweet/sour sauce (up 27%), soy sauce (24%), marinades/bastings (23%), steak sauce (20%) and barbecue sauce (17%).

The spices and seasonings group, which also exhibited only a small increase in price per pound during 1973, more than kept pace with condiments/sauces. Dollar volume jumped nearly 10% to $194 million, while MRCA Menu Census measurements indicated a 1[illegible]% jump in at-home use.

Convenience - Larger Sizes

Ongoing trends in the condiment and spice categories stress convenience and larger size packages. For example: dry gravy, seasoning and sauce mixes are prepared in minutes, with one new dry gravy mix ready in 60 seconds. Packages of parsley flakes, celery salt, black pepper, chopped onion and many others now are available in half-pound economy sizes, as well as the traditional one-ounce and two-ounce "spice rack" sizes.

Progressive Grocer's composite super store shows that condiments and sauces is a large category (320 items) doing slightly over 1% of total store dollar volume at a good margin (20.8%).

(Continued on page 26)

Condiments-Sauces

(Continued from page 24)

Spices, extracts and colorings not only bring in more total dollars than any other lines in the category (31%), but also work on the highest margin—29%—well above average.

See data on items carried, dollar sales and margin in Table B.

Prepared Items Thrive on Ease, Economy Image

As a combined category, prepared foods and canned meats have two important things in common that give them a very positive image in terms of current consumer concerns and life-styles. For one thing, they represent an alternative to fresh meats as shoppers increasingly look for dollar-stretching substitutes. And both prepared dinners with their starch content and canned meats with their budget reputation, fill the bill. The other common point is convenience, and if you think that economy and convenience don't go hand-in-hand as key symbols of today's consumer, then look again.

Impressive Rise

U.S. dollar volume in canned meats last year rose an impressive 19% to $716 million, reports SAMI, while prepared foods volume rose 15% to $1.13 billion. The pattern of growth is undeniable, although a solid part of it is accounted for by inflation. Corned beef has, by one reliable count, increased 9% in units in 1973 but 28% when measured in dollars. And SAMI reports that in the last 12 weeks of last year, meat stew dollar volume jumped almost 12% while poundage remained steady.

What with controls, shortages and price fluctuations, even manufacturer marketing men find it confusing when they try to keep tabs on canned meat trends. They are heartened, however, by the prospects that meat prices generally will continue to moderate. This in turn would permit canned meats to hold onto their economy image. Among the canned meat types that enjoyed better-than average growth last year, by SAMI's nationwide count: beef hash, poultry products, corned beef, lunch meat, dry beef and hams/bulk meats.

Prepared Dinners

Prepared foods alone comprise a lively category that in recent years has turned in some excellent profit dollars for grocers. Prepared dinner mixes of the you-add-the-meat variety took top honors for the third year in a row in Progressive Grocer's annual poll of super market managers. Prepared stuffing mixes joined the list this year in

TABLE B

CONDIMENTS, SAUCES	319.7	3736.8	(1.4)	1528.25	(1.1)	317.88	(1.0)	[illegible]
Barbecue Sauce	12.3	125.9	3.4	53.16	3.5	9.54	3.0	[illegible]
Catsup	10.2	717.9	19.2	333.64	21.8	30.20	9.5	[illegible]
Chili Sauce	2.0	41.1	1.1	18.45	1.2	3.50	1.1	[illegible]
Meat Sauce	26.3	285.3	7.6	126.18	8.2	26.38	8.3	[illegible]
Mustard	14.5	270.8	7.2	70.48	4.6	14.30	4.5	[illegible]
Salt	19.7	367.9	9.8	75.76	5.0	15.58	4.9	[illegible]
Sandwich Spread	2.0	18.3	0.5	9.55	0.6	1.91	0.6	20.0
Sauces/Gravy Mixes	34.7	458.7	12.3	103.89	6.8	25.75	8.1	24.8
Seafood and Tartar Sauce	4.5	58.7	1.6	22.33	1.5	4.77	1.5	21.4
Spaghetti Sauce	12.7	252.3	6.8	141.23	9.2	27.65	8.7	19.6
Spices/Extracts Colorings	167.3	921.7	24.7	476.29	31.2	137.96	43.4	29.0
Vinegar	12.5	211.1	5.6	94.90	6.2	19.71	6.2	20.8
Misc.	1.0	7.7	0.2	2.39	0.2	.63	0.2	26.4

Number Three spot and are already performing with real strength in many markets.

You-add-the-meat dinners, however, are showing certain signs of softness. In the composite Progressive Grocer super store, they make up 7.7% of the category's margin compared with 13.4% only a year ago. To informed observers, this recent weakness indicates a number of things: oversaturation by too many brand entries; reaction by consumers who decided that it would be more economical to add their own ingredients; and a reluctance by some shoppers to pay the cost of fresh hamburger and of the packaged dinners. There was also the increased marketing of textured vegetable extenders to mix with chopped beef. And there was the easing of meat prices which brought many consumers back to their old don't stretch-the-meat habits.

For their part, marketers of the new prepared stuffing mixes are promoting them as far more than something to stuff into a whole bird, positioning the products as substitutes for potatoes, fice, noodles and other starches.

Canned Products

Meanwhile, the subcategories that show the strongest growth on a year-to-year basis generally appear to be those that offer readily recognizable savings for budgeting housewives, plus convenience, plus a little ethnic flair if possible. With pork and beans/baked beans, that may not be possible, but they still enjoy strong growth. Italian and Mexican canned specialties do fill the complete bill, and as such are increasingly popular. So are dehydrated potatoes, offering a triple threat of low price, convenience and adaptability.

See data on items carried, dollar sales and margin in Table C.

Frozen Sauce

Purity Steak Corp. has a new fr[illegible]en spaghetti sauce with meat for [illegible]od service.

National Macaroni Week
October 3-12, 1974

TABLE C

PREPARED FOODS & CANNED MEAT	225.5	4970.1	(1.9)	2212.72	(1.6)	402.72	(1.2)	[illegible]
Italian Canned	26.2	880.9	17.7	325.83	14.7	60.81	15.1	[illegible]
Mexican	24.5	332.4	6.7	177.10	8.0	31.01	7.7	[illegible]
Oriental	25.0	427.3	8.6	223.90	10.1	45.10	11.2	[illegible]
Pizza Mix	8.2	123.1	2.5	79.76	3.6	14.10	3.5	[illegible]
Pork & Beans/ Baked Beans	24.5	1302.6	26.2	383.26	17.3	70.48	17.5	18.4
Prepared Poultry	10.7	151.6	3.1	77.10	3.5	14.90	3.7	19.3
You-add-the-meat Dinners	17.3	272.8	5.5	159.16	7.2	31.01	7.7	19.5
Misc. Pkgd. Dinners	28.2	495.4	10.0	192.09	8.7	33.83	8.4	17.6
Canned Meat Spreadables	9.7	104.1	2.1	56.58	2.6	10.47	2.6	18.5
Other Canned Meat	29.2	504.6	10.1	345.65	15.6	56.38	14.0	16.3
Dehydrated Potatoes	15.4	262.7	5.3	134.60	6.1	23.76	5.9	17.7
Stuffing Mixes, Dry Prep.	6.6	112.6	2.2	57.69	2.6	10.87	2.7	18.8

Food Is More Than Just Something To Eat

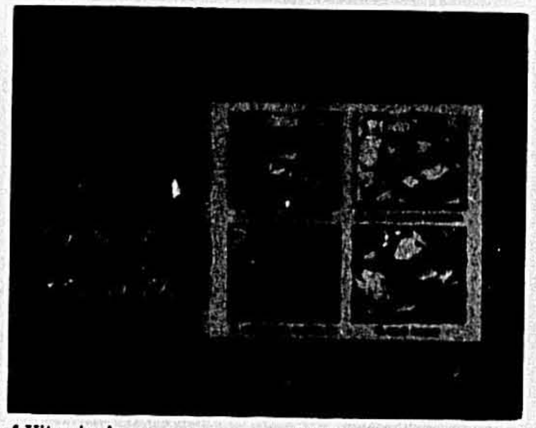
Prepared by the U.S. Department of Agriculture and Health, Education and Welfare in cooperation with the Grocery Manufacturers of America, and the Advertising Council.

"Food Is More Than Just Something To Eat" is in eight parts. Two parts appear in this issue:

(6) A Daily Food Guide. (7) The Value of Processed Foods. (8) The Many Ways of Eating.

Last month: (4) Food For All Ages. (5) Nutritional Labeling.

Prior month:
(1) Food Is the Basis of Life.
(2) The Major Nutrients & Where to Find Them.
(3) How It All Works Together.



A Daily Food Guide

The daily food guide below presents foods in four groups on the basis of their similarity in nutrient content. The four groups are:
- the meat group
- the vegetable-fruit group
- the milk group
- the bread-cereal group

Meat Group

Foods included: Beef, veal; lamb; pork; variety meats, such as liver, heart, kidney. Poultry and eggs. Fish and shellfish.

As alternates—dry beans, dry peas, lentils, nuts, peanuts, peanut butter.

Amounts Recommended: Choose two or more servings every day. Count as a serving: 2 to 3 ounces of lean cooked meat, poultry or fish—all without bone.

One egg, ½ cup cooked dry beans, dry peas, or lentils, or 2 tablespoons peanut butter may replace one-half serving of meat.

Vegetable-Fruit Group

Foods included: All vegetables and fruits. This guide emphasizes those that are valuable as sources of vitamin C and vitamin A.

Sources of Vitamin C:

Good sources—Grapefruit or grapefruit juice; orange or orange juice; cantaloupe; guava; mango; papaya; fresh strawberries; broccoli; brussels sprouts; green pepper; sweet red pepper.

Fair sources — honeydew melon; lemon; tangerine or tangerine juice; watermelon; asparagus tips; raw cabbage; collards; garden cress; kale; kohlrabi; mustard greens; potatoes and sweet potatoes cooked in the jacket; spinach; tomatoes or tomato juice; turnip greens.

Sources of Vitamin A:

Dark green and deep yellow vegetables and a few fruits: Apricots, broccoli, cantaloupe, carrots, chard, collards, cress, kale, mango, persimmon, pumpkin, spinach, sweet potatoes, turnip greens and other dark green leafy vegetables, winter squash.

Amounts Recommended:

Choose four or more servings every day, including:

One serving of a good source of vitamin C or two servings of a fair source.

One serving, at least every other day, of a good source of vitamin A. If the food chosen for vitamin C is also a good source of vitamin A, the additional serving of a vitamin A food may be omitted.

The remaining one to three or more servings may be of any vegetable or fruit, including those that are valuable for vitamin C and for vitamin A.

Count as one serving: ½ cup of vegetable or fruit; or a portion as ordinarily served, such as 1 medium orange or potato, half a medium grapefruit or cantaloupe, or the juice of one lemon.

Milk Group

Foods included: Milk—fluid whole, evaporated, skim, dry, buttermilk. Cheese—cottage; cream; Cheddar-type, natural or processed. Ice cream. Yogurt.

Amounts Recommended: Some milk every day for everyone.

Recommended amounts are given below in terms of 8-ounce cups of whole fluid milk:

Children under 9	2 to 3
Children 9 to 12	3 or more
Teenagers	4 or more
Adults	2 or more
Pregnant women	3 or more
Nursing mothers	4 or more

Part or all of the milk may be fluid skim milk, buttermilk, evaporated milk or dry milk.

Other milk products, such as cheese, ice cream or yogurt, may replace part of the milk. The amount it will take to replace a given amount of milk is figured on the basis of calcium content. Common portions of cheese, yogurt and ice cream and their milk equivalents in calcium are:

1-inch cube Cheddar-type cheese = ½ cup milk
½ cup yogurt = ½ cup milk
½ cup cottage cheese = ⅓ cup milk
2 tablespoons cream cheese = 1 tablespoon milk
½ cup ice cream or ice milk = ⅓ cup milk

Bread-Cereal Group

Foods included: All breads and cereals that are whole grain, enriched or restored; check labels to be sure.

Specifically, this group includes: breads; cooked cereals; ready to eat cereals; cornmeal; crackers; flour; grits; macaroni and spaghetti; noodles; rice; rolled oats; and quick breads and other baked goods if made with whole-grain or enriched flour.

Bulgur and par-boiled rice and wheat also may be included in this group.

Amounts Recommended: Choose four servings or more daily. Or, if no cereals are chosen, have an extra serving of breads or baked goods, which will make at least five servings from this group daily.

(Continued on page 30)

Food Is More

(Continued from page 28)

Count as one serving: 1 slice of bread; 1 ounce ready-to-eat cereal; ½ to ¾ cup cooked cereal, cornmeal, grits, macaroni, noodles, rice, or spaghetti.

Other Foods

To round out meals and meet energy needs, almost everyone will use some foods not specified in the four food groups. Such foods include: unenriched, refined breads, cereals, flours; sugars; butter, margarine, other fats. These often are ingredients in a recipe or added to other foods during preparation or at the table.

Try to include some vegetable oil among the fats used.

Milk provides protein, riboflavin, vitamin A, and many other nutrients. Cheese and ice cream also supply these nutrients, but in different proportions. When fortified with vitamin D, milk is the major source of this vitamin in the diet.

Meat, poultry, fish and eggs from the meat group are valuable sources of protein, iron and the B vitamins—thiamin, riboflavin and niacin. Dry beans, dry peas and nuts are almost as useful and are usually listed in the meat groups.

The vegetable-fruit group supplies most of the vitamin C and vitamin A in the diet. Concentrate on the dark green and deep yellow fruits and vegetables for their vitamin A value and on citrus fruit and a few others for vitamin C.

A short list cannot do justice to all of the useful sources. Cantaloupe, strawberries and mangoes are also good sources of vitamin C. Nor does a food have to be among the best sources of vitamin C. It is just that it may take more to fill the need.

The bread-cereal group with its whole grains, enriched bread and other cereal products, provides protein, iron and several vitamins. One ounce of ready-to-eat cereal does about as much as ½ to ¾ cup of cooked cereal product, cornmeal, macaroni, noodles, rice or spaghetti.

Fats, oils, sugars and sweets are not usually shown on food guides. They are common to every diet, however, and are energy sources. They also make the diet more attractive and acceptable to some people. Some of the fats and oils provide vitamin A and E; some furnish essential fatty acids. Since these foods are apt to be high in calories, they should be used in moderation.

Foods from each group can be part of every meal, but they do not have to be.

Also, some foods fall into several groups, pizza for example. It is desirable, however, to have the proper number of servings from each of the groups in the course of the day.

The same food guide can work for everyone. The difference is only in the quality; more of everything for the ravenous teenager, and choices with fewer calories for the dieting adult; more of certain foods for the pregnant woman, and less of these foods for her husband.

Don't neglect breakfast. Many people skip breakfast but scientists have found much evidence that a good breakfast can make a person more alert and productive throughout the morning. And a good breakfast can provide a good start to meeting the daily nutrient needs.

The Value of Processed Foods

Fresh or frozen? Canned or dried? Instant or from scratch? Which foods have the nutrients? Which do not? They all do. All foods have their place.

And virtually all food in its place is good food. Some foods are safer to use when they are processed. Some are more appealing when fresh.

Packaged, pasteurized, fortified milk has been around so long no one thinks of it anymore as a processed food, but it is. Because it is pasteurized—or processed—milk is now safe to drink. Unpasteurized milk may carry disease-producing germs.

Whole grain breads and cereals retain the germ and outer layers of grain where the B vitamins concentrate. Milling wheat to white flour refines them out.

Since many people seem to prefer white bread, it is wise to choose the enriched product because of added nutrients.

Brown rice has food value that unenriched polished white rice does not; enriched, parboiled or converted rice retains most, though not all, of the nutrients.

Buy the mix or do it yourself? It is all the same nutritionally if the ingredients listed on the label are used in the same amounts and are the same as the ingredients you would use doing it yourself.

Foods in the frozen food case offer as much food value as those in the produce section of the store. It just depends on which foods one prefers and the cost factor.

Any loss of vitamin C in frozen fruits is negligible. The blanching process does, however, reduce slightly the vitamin C and some of the other water-soluble vitamins and minerals in frozen vegetables.

Properly packaged frozen meat, poultry and fish carry the same food value they would if they were purchased directly from the butcher or the fish market.

Fresh or raw foods are not necessarily better than canned or frozen ones. It depends on how they are handled. The vitamin C value of frozen, reconstituted orange juice is the same as the juice squeezed fresh from oranges.

Leafy, dark green vegetables and broccoli packed in crushed ice keep practically all of their vitamin C on their way to market. Left in the refrigerator for 5 days or so they lose about half of it. Cooking will also cause losses.

Although the loss may be great, these vegetables contain large amounts of vitamins and they still provide generous amounts of vitamin C and vitamin A when they are eaten. Raw cabbage, on the other hand, stores well.

It holds its vitamin C well even at room temperature.

Sweet potatoes actually improve in storage. The vitamin A value of sweet potatoes increases during the maturing period before they reach the retail store.

Berries need tender care. They lose their vitamin C in a hurry if they are capped or bruised.

Water-soluble vitamins do just what their name implies: they dissolve in water and if excess water is used in cooking, and then discarded, a loss occurs.

Leftovers and foods cooked ahead of time may save time, but they can have a loss in food value. Cooked vegetables lose about one-fourth of their vitamin C after about a day in the refrigerator.

They lose about one-third after two days. Careful planning is needed if food values are to be protected.

When meat or poultry is stewed, some of the B vitamins end up in the stock, that is, the left-over liquid. With a kettle of stock you are well on your way to a nourishing soup, a flavorful liquid in which to cook rice, or to use as the liquid base for scalloped or creamed dishes.

Cold makes the difference for frozen foods. Most frozen foods should be stored far below the 32 degree freezing point to retain the vitamin C.

Acid foods like orange and tomato juice, however, hold on to their vitamin C tenaciously.

Frozen concentrated orange juice which kept at only 32 degrees loses

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Food Is More

(Continued from page 30)

only 5 per cent of its vitamin C in a year.

This is not true for most other foods. At 0 degrees Fahrenheit, frozen beans, broccoli, cauliflower, and spinach lose one-third to three-fourths of their vitamin C in a year. If you cannot get your freezer to 0 degrees or below, remember that some stored foods will not hold their best nutritive value. It is wise to buy in smaller quantities and not hold them as long.

Other nutrients are not as unstable as vitamin C and so are not as affected by temperatures.

The Many Ways of Eating

Americans pick and choose their diets from the traditions of the whole world.

Whether it is pumpkin pie or Chinese fried rice, much of our food has a special history and we are the richer for it.

Our food has all sorts of social, geographical and cultural traditions. Baseball and hot dogs, San Francisco and Chinese food, New Orleans and shrimp gumbo, the Southwest and chili are a few of these traditions.

Everyone needs the same nutrients but we can take them as we like them.

Protein is important to us all. If our heritage is Mexican-American, we can get a healthy amount of protein at a low cost in such dishes as refried beans.

Or iron. Jewish women, like all women, have a special need for iron in their diets. Of the many Jewish foods, one of the most popular is a good source of iron, chopped chicken livers.

Families from Puerto Rico need milk as everyone else does.

They get a fair amount of it in cafe con leche or in flan. Hankering for soul food, you may find yourself fixing grits and turnip greens—and when you do you are serving up a large portion of iron, vitamin A, B vitamins and vitamin C.

Every cultural tradition allows for enough good food for people to be healthy as well as happy at the dinner table.

Traditional eating patterns and habits may suffer a change on their way to this country, or from farm to city, but nourishment in the food itself remains the same.

Rice, for example, is a mainstay at Puerto Rican tables; it is just as important when the family moves to New York.

But there are times when the tradition itself changes, catching the homemaker unaware. Older Mexican-Americans like their tortillas made from cornmeal.

Their children often prefer them made from wheat flour, and thus lose out on the calcium that attached itself to the corn in the processing.

For all its people, however, the United States has one of the best food supplies in the world, whether measured in terms of quantity, quality, variety or availability.

If your diet contains a good variety of foods, whether fresh or packaged, meats and vegetables, milk, cereals and grains, fruits and cheeses in the necessary amounts, good nutrition will take care of itself.

Egg Review

5,481,000,000 eggs were produced during July, slightly below a year ago according to the Crop Reporting Board. Layers on farms August 1 totaled 277,000,000, down 2% from the 283,000,000 a year ago, and 1% fewer than a month earlier. Rate of lay August 1 averaged 63 eggs per 100 layers up from 62.2 a year ago but down from the 64.3 on July 1. The egg-type hatch in July totaled 37,400,000,000, 9% below a year earlier. Eggs in incubators on August 1 at 32,000,000 were 10% below a year ago.

Processed Eggs

A total of 40.4 million dozen shell eggs were broken during the 20-day period July 1-July 20, 1974 under the USDA's Egg Products Inspection Act.

During the 20-day period, 61 million pounds of liquid egg items were used in processing. Ingredients added in processing totaled 2.2 million pounds.

Liquid egg products (including ingredients added) produced for immediate consumption and processing totaled 19.6 million pounds during the 20-day period. Products for immediate consumption totaled 7.2 million pounds and those produced for processing totaled 12.3 million pounds.

Frozen egg products amounted to 23.2 million pounds and dried egg products totaled 4.7 million pounds.

Henningsen in Holland

Victor W. Henningsen, Jr., President of Henningsen Foods, Inc., announced from Henningsen's executive headquarters in White Plains, New York that egg breaking and processing equipment for Henningsen's first venture abroad is currently enroute to Amsterdam, Holland.

Henningsen Foods, Inc. and Van den Burg Eiprodukten b.v. of Waalwijk, Holland recently announced the formation of a new company in the Netherlands, Henningsen-Van den Burg b.v., to process high quality egg solids in the Netherlands. The new factory which is currently under construction in Waalwyk, Holland will be supplied with egg breaking and egg processing equipment of Henningsen's own manufacture as well as a Henningsen Model 1500 Gentleaire Spray Dryer. This dryer, which is the first spray dryer ever to be designed specifically to dehydrate egg products, will be Henningsen's second spray dryer installation abroad this year.

A Henningsen Model 1500 Gentleaire Spray Dryer is currently being installed in Japan for the KEWPIE Company and is being installed in KEWPIE's new Goka egg processing factory.

Both installations will be completed by about the end of 1974 and Henningsen is negotiating to place other egg processing systems in other overseas areas at the present time.

Hamburger Pizza Dish

General Mills, Inc., Minneapolis, has added a pizza-flavored dinner mix to its Betty Crocker line of Hamburger Helper products. Called Hamburger Pizza Dish, the "tangy pizza flavor" product contains wagon wheel macaroni and is intended for use with 1 lb. of hamburger. Each package contains enough mix for five 8-oz. servings and sells for about 69¢.

"In consumer testing," the company said, "Hamburger Pizza Dish scored high in all-family flavor appeal. This new dinner mix meets a taste need that is becoming increasingly papular.

"Hamburger Pizza Dish has the same one-pan convenience characteristic of Betty Crocker Hamburger Helper dinner mixes. Included are all necessary ingredients except ground beef and water."

Introductory advertising began this month, the company said. The campaign includes promotion spots on daytime and prime nighttime network television shows, and four-color, full-page ads in the September issues of Ladies Home Journal and Good Housekeeping and the October issues of True Story and Family Circle. The advertising agency in charge of promotion for Hamburger Pizza Dish is Wells-Rich-Greene, New York.

Quarterly Durum Report

Durum Stocks Smallest In Decades

Supplies Hold As World Demard Eases

The Crop Reporting Board forecasted production of durum wheat at 85.3 million bushels on August 1, 1974. This is barely above the 1973 crop and 17.0 per cent above two years ago. The 15 per cent decline from the forecast published July 11, 1974 is attributed to unusually dry weather in the major producing area. Yield per harvested acre is expected to be sharply below the last 3 years. Yield is forecast to average 22.8 bushels per acre compared with 28.5 bushels last year and 28.6 in 1972. Prospective 1974 yield is the lowest since 1961. Acreage for harvest is expected to total 3.7 million acres, 26 per cent above last year and 47 per cent above 1972. Condition of the crop in North Dakota continued to deteriorate during July despite moisture received near mid-July. Above normal temperatures and hot, dry winds during the month caused stress conditions in many areas. Harvesting in South Dakota was past the half-way mark by August 1. The crop in Minnesota is maturing rapidly and swathing was expected to begin after mid-August. Montana's crop has suffered from lack of moisture and grasshopper infestations are causing some damage.

Stocks

Old crop durum wheat stocks on July 1, 1974 totaled 29.6 million bushels, 20% less than last year and 57% below two years ago. Farm holdings of 19.6 millicn bushels were 2% below last year, and off-farm stocks of 10.0 million were down 41%. Disappearance for the crop year ended June 30, 1974 is indicated at 92.2 million bushels, compared with 105.3 million a year earlier.

Exports

The past crop year was one of the most dramatic in history for exports. A large 1973 crop was produced but overseas demand started out so strong that market prices the first of March reached $8.75 per bushel. Since this high point world demand tailed off as durum supplies appeared adequate. Durum wheat exports decreased to 40.2 million bushels for this past crop year, which was 24.8 million under a year ago. Uncertainty, however, continues with world supplies tight and demand growing.

Algeria moved up from second to first place as the most important export customer for durum wheat in the crop year 1973-74. Italy was second, Netherlands third. These were followed by Belgium, France, U.S.S.R. and Venezuela.

Canada exported 51,524,000 bushels of durum in the same crop year with Algeria and Italy her best customers. U.S.S.R. was third and West Germany fourth.

Mac[illegible]odle exports in the crop year [illegible] mounted to 30,663 cwts. up fro[illegible] cwts. in 1972-73.

In Canada

Canadian farmers, according to the Canadian Grain Commission, increased durum acreage to 3,200,000 acres compared to 2,550,000 in 1973. Canadian statistics on August 1 showed durum crop conditicns varying, but in general they were favorable. Exports of durum wheat from Canada totaled 51,500,000 bushels in the 1973-74 season, compared to 60,100,000 shipped the prior season. U.S.S.R. continued to be the best customer taking 6,400,000 bushels.

Canadian Seeding

Seeding of spring wheat in the prairie provinces for the 1974 crop totaled 20.1 million acres, down 7% from 1973 seedings of 21,650,000, according to estimates by **Statistics Canada.** This year's acreage is up from 17,640,000 acres in 1972 but 11% below the 1963-72 average of 22,655,800.

Durum wheat plantings in the prairies this year are estimated at 3.2 million acres, up 25% from 2,550,000 seeded last year and 52% more than the 1963-72 average of 2,098,000.

In Saskatchewan, spring wheat plantings are estimated at 13.1 million acres and durum at 2.7, down 11% and up 54% from 14 million and 2.2 million respectively, last year; in Alberta, spring is at 4.1 million and durum 400 00, down 20% and up 68%.

IM Automated Warehouse

International Multifoods Corp. is constructing a fully-automated warehouse addition at its Buffalo flour mill, the largest of 10 mills operated by the Industrial Foods Division of the Minneapolis-based company.

The 9,000-square foot addition is designed to improve efficiency in bagged flour operations by utilizing an automated, palletized loading system. The project, one of several undertaken in recent years to improve the 47-year-old mill, will cost about $500,000.

Other recent improvements at the Buffalo mill include replacement of several dust collectors with cloth bag filters as part of a continuing dust control and pollution abatement program in cooperation with county and state health and environmental conservation officials.

The Buffalo mill has a wheat flour capacity of 21,500 cwts.

Nissin Foods Expands

Nissin Food Products Co. of Japan said it will double its investment in the American subsidiary Nissin Foods U.S.A., Los Angeles. Funding of $1.2 million will be established for use in expanding production of pre-cooked noodles for the American market. Nissin said the move was necessitated by growth in demand for its noodles in the U.S.

The parent company made a similar move last September, when it doubled the subsidiary's assets to $600,000 and started manufacturing cup noodles, which are cooked Chinese-style noodles packed in cups. Nissin U.S.A. also manufactures instant Chinese noodle preparations sold in 3½-oz. packages.

Nissin U.S.A. was established in 1970 by Nissin Food and two other Japanese interests. It was the first wholly-owned Japanese manufacturing facility in the United States.

36th Annual Durum Show
Langdon, North Dakota
Oct. 21-22-23

DURUM WHEAT

State	Acreage Harvested 1972	Acreage Harvested 1973	For Harvest 1974	Yield Per Acre 1972	Yield Per Acre 1973	Indicated 1974	Production 1972	Production 1973	Indicated 1974
	1,000 Acres			Bushels			1,000 Bushels		
Calif.	4	2	3	39.0	50.0	50.0	156	100	150
Minn.	32	58	94	31.0	36.0	35.0	992	2,088	3,290
Mont.	134	182	242	31.5	22.0	22.0	4,221	4,004	5,324
N. Dak.	2,298	2,620	3,190	28.5	29.0	23.0	65,493	75,980	73,370
S. Dak.	82	112	208	25.0	24.0	15.0	2,050	2,688	3,120
U.S.	2,550	2,974	3,737	28.6	28.5	22.8	72,912	84,860	85,254

Packaging and the Public Interest

As a social and economic force for good, packaging plays many roles. It protects, improves nutrition, saves time, reduces waste. As the backbone of our food distribution system, it is inextricably interwoven into our way of life.

American Can Company believes this is a story worth telling. The story that follows appears in their annual report to shareholders.

Packaging and the Public Interest

A major portion of this Report to shareholders is devoted to the packaging products of our business— packages of diverse shapes, sizes and materials for the equally diverse range of foods and goods consumed by the American public. In some quarters, packaging—particularly packaging which is "non-returnable"—is criticized by those who see it as a contributor to solid waste and litter, as an inefficient consumer of energy and materials, or perhaps as evidence of an "ethic of convenience" which they find inappropriate or offensive.

This criticism ignores the fact that non-returnable packaging is an essential component of the world's most efficient system for the production and distribution of food and non-food products. In our economy, fewer and fewer people are engaged in the "production" of food and goods. Less than 5 per cent of us grow the food; there are fewer workers in the manufacturing sector of the economy than in the service sector; 80 per cent of us who "consume" are centralized in only 2 per cent of our land area. Between producers and consumers, packaging is the pipeline; when we left the era of the country store and moved into the age of mass production and distribution, returnable packaging became an anachronism.

As our population grew, as producers and marketers concentrated their resources to supply mass markets, only one mode of packaging—non-returnable packaging—could sustain the inherent efficiency and diversity of our evolving economy. Without it, quite literally, the American economy would not work.

Now, in response to valid concern for the conservation of materials and energy, we have the technology to recover discarded packaging and other material from the solid waste stream. Rather than try to turn the clock back, we can move ahead systematically to "recycle" solid waste.

The Food System

Let's look at packaging in the context of food, which accounts for more than half of all packaging.

The preparation, preservation and distribution of much of what we eat today is dependent on packaging. In and of itself, packaging has improved food consumption patterns in the following ways:

- Packaging keeps the cost of our food down. In the United States, food takes 16 per cent of disposable family income—the lowest percentage in the world.
- Packaging makes seasonal products available the year round, offering nutritional opportunities that otherwise would not exist.
- Packaging improves sanitary conditions under which food is delivered and consumed.
- Packaging provides a much broader variety of food items than otherwise would be available.
- Packaging has reduced home meal preparation time by 60 per cent in the past generation.
- Packaging promotes efficiency and economy of consumption through the wide range of sizes in which foods are made available—small sizes for the small family, large sizes for the large family.

A System within a System

As packaging sustains the efficiency of the food distribution system it also works within itself to check "excess packaging." A continuing reduction in the weight and gauge of cans, bottles and paperboard, for example, has held packaging costs well below the inflationary spiral of recent years. Any packager who "over-packages" will soon lose his competitive advantage. By the same token, too little packaging will increase costs, because of damage and spoilage, as the product moves through distribution channels to the consumer.

At the end of the distribution chain, the package meets the consumer, usually in a retail store. The consumer expects the product to be in the same condition as when it left the processing plant weeks, months or possibly years before. The performance of the package at this point usually determines its success, and often that of its contents, in the marketplace. Thus the consumer becomes an active decision maker in the packaging system. And the consumer invariably opts for the package that best meets his own definition of value, including the value of convenience.

The Package Goes Full Circle

The packaging system ostensibly ends with the consumer, but the life cycle of the package does not. Billions of packages annually end up in a disposal system that has remained essentially unchanged since the time of Julius Caesar, although the degree to which packaging actually reduces solid waste is often overlooked.

For example, the food industry generates 10 million tons of waste in processing 33.5 million tons of fruit, vegetables and seafood every year. But because this waste is centralized at a few locations, it is possible to "recycle" 70 per cent of it, primarily as animal feed.

Without packaging, these wastes would accumulate in our cities, where they would add to the already overburdened municipal collection and disposal systems.

Consider oranges. The juice of hundreds of millions of oranges is shipped all over North America every year, all year round. But 60 per cent of the orange, thanks to packaging, is left behind in Florida, where the peels and pulp are recycled into cattle feed. And head lettuce, for example, can be picked and packaged right in the field. In the process, the outer leaves are stripped and left to enrich the soil, reducing the need for fertilizers. Formerly, about 20 per cent of such products as lettuce and grapes became waste in the store; packaging has reduced spoilage to less than 2 per cent.

Closing The Loop

The real issue in solid waste management is to recover the discarded materials. And packaging companies are in the forefront of efforts to make the disposal system as effective as the distribution system. In 1970 all the major industries involved in packaging, along with leaders of organized labor and the scientific community, formed the National Center for Resource Recovery. This body works closely with the Environmental Protection Agency (EPA), and is involved in research and demonstration of resource recovery techniques.

American Can has developed its own commercial system for recovering usable energy and marketable resources from solid waste. Based partly on the

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Packaging and the Public Interest

(Continued from page 36)

experience and technology of our metals recovery business, it is called "Americology," and is under active consideration by major cities across the country.

One Americology plant will convert the refuse of a city of from 200,000 to 400,000 into separated marketable components. It will guarantee markets for the ferrous metal scrap, develop markets for non-ferrous metals, paper and glass, and separate the combustible portion into a fuel source that can be burned by utilities to produce energy.

Other systems are coming on stream, and state and local governments are beginning to deal with garbage as a potential source of energy:

Connecticut has authorized a statewide network of resource recovery plants that is calculated to produce 11 per cent of the entire state's electricity, while disposing of 80 per cent of its rubbish.

In Nashville, a refuse-burning facility will power both heating and air conditioning for 38 downtown buildings.

In St. Louis, the Union Electric Co. is feeding shredded rubbish and garbage directly into boilers to replace 10 per cent of coal requirements.

In Chicago, Baltimore and San Diego, energy-from-garbage plants are underway or in final planning stages.

One Quadrillion BTUs of Energy

Tests by Americology engineers and others have shown that the combustible portion of solid waste—the 50 to 60 per cent that an Americology plant would separate out for recovery as fuel—contains roughly 6,000 to 8,000 BTUs per pound. It's a clean-burning, low sulphur fuel source that can be used by power companies and others as a substitute for coal.

The EPA estimates that if resource recovery were practiced just in the major urban areas of the United States, approximately one quadrillion BTUs of energy could be produced annually. This is equivalent, it says, to the nation's entire energy consumption for residential and commercial lighting, or more than half of the direct oil imports from the Middle East, or almost one-third of the energy to be delivered by the Alaskan pipeline.

It will take time and much money to reach this goal. But the realization grows that solid waste, including discarded packaging, must be used as a supplementary source of energy.

The Public Interest

Of all the targets for critics of packaging, none arouses more emotion than the non-returnable container of beer and soft drinks. Yet nowhere is the relationship between the package and the total food distribution system better illustrated. The one-way beverage can, which originated in the technology of the sanitary food can, grew in response to precisely the same stimulus that created other forms of non-returnable packaging: namely the search for the most efficient container for producer, retailer and consumer.

With one-way containers, brewers and soft drink packers capitalize on the inherent efficiencies of modern, centralized plants to serve growing markets. Retailers conserve shelf space, storage areas and labor. And most important, because the non-returnable system reduces the distribution cost significantly, the consumer is offered the highest quality, most convenient package at the lowest cost.

Legislation to ban or restrict the use of non-returnables threatens serious damage to a system that serves the public well. Experimental legislation now in effect has shown these upsetting characteristics and has not dealt effectively with either litter or solid waste. The public interest would best be served by the establishment of investment incentives at the national level to accelerate the flow of capital and technology into resource recovery systems for solid waste.

The World Problem

It took from the beginning of time until the year 1860 for the earth's population to reach one billion people. In one century, by 1960, we added two billion more. By 1975 we will have added another billion.

With billions of people to feed, we cannot go back to small farms; we must rely on mass production. Neither can we go back to returnable containers and force used packaging counterclockwise through the system.

We have already achieved efficient production of food and other goods; we have perfected a finely tuned distribution and merchandising system. And we are on the threshold of closing the circle with mass recovery of solid waste and reuse of the recaptured resources. Within this solution, packaging and resource recovery will play a unified role in making life more than mere subsistence.

Pallet Specifications

The food industry Grocery Pallet Council (GPC) has issued its recommended specifications for pallets designed to facilitate pallet interchange within the industry, with the endorsement of the major food trade associations.

GPC plans to license pallet manufacturers to produce pallets meeting the specs. Although GPC is a voluntary organization, the logo which will identify a pallet meeting the specs does have trademark status, and those who use the logo on pallets that do not meet specs can be prosecuted.

Most of the manufacturing, wholesaling and retailing firms in the food industry are members of one or more of the endorsing associations.

48 x 40

The recommendations specify a 48x40 inch wooden pallet with a four-way entry. A diagram and explanation of dimensional requirements are included. A GPC spokeswoman said the council does have provisions of modification of pallet specs to meet future needs.

Types of lumber permissible for both stringers and deckboards are specified.

Under the heading of permissible defects, GPC states that the diameter of sound knots should be no greater than one-third the width of the piece with no more than two such knots in one piece. Loose or hollow knots "should not exceed one-half the diameter of sound knots," according to the specifications. Also, "no knots should be allowed in the stringer immediately over the notched areas that would impair the strength of the stringer." Other permissible defects are spelled out.

The recommendations specify the manner of preparing the lumber for pallets and the type and quality of fasteners to beused.

Dimensions - Spacing

Under the heading "dimensions, spacing and arrangement," the report specifies the thickness of deckboards as 13-16—15-16 in. and length as 39⅞-40⅛ in. Top end deckboards must be 5⅝ in. minimum width; intermediate deckboards may be random widths, with a 3⅝-in. minimum. Spacing between top deckboards can be no more than 3 in.

Bottom-end deckboards must be 5⅝-6 in. to meet specifications. Intermediate bottom deckboards can be varying widths, with a 3⅝-in. minimum.

"Bottom deckboards should not protrude over any notch opening; ends of

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INDEX TO ADVERTISERS

CLASSIFIED

ADVERTISING RATES

Want Ads ....$1.00 per line

Minimum $3.00

Display Advertising ....Rates on Application

WANTED—In reliable working condition, Braibanti ZAMBONI Model PI/380 Mixing-Sheeting-Noodle Machine with attachments. Write to Mrs. Linda Barbani, 4514 Vista Del Monte, Sherman Oaks, California 91403.

WANTED—150-2(? lb. capacity dough mixer and kneader. Various 14" pasta dies: elbows, stars, alphabet, spaghetti, etc. Best offer. Telephone (312) 847-6459.

FOR SALE—83 page book on Macaroni, Noodles, Pasta Products by James J. Winston, $5.00 postpaid if check is sent with order. P.O. Box 336, Palatine, Ill. 60067.

John S. Robilio, Jr., Dead

John S. Robilio, Jr. passed away August 23 after a long illness. He was the oldest brother of the late Albert Robilio and a partner of Ronco Foods, Memphis. He is survived by a son, Jay, Advertising Manager for Ronco, as well as several brothers and sisters.

John A. Guhl

John A. Guhl has been named Central States representative for durum sales by International Multifoods Corp.

Previously bakery products territory manager at Cleveland, Mr. Guhl joined Multifoods in 1960.

Pallet Specifications

(Continued from page 38)

all deckboards should be flush with outside of stringers," the recommendations state. Specifications for chamfered edges are also given.

Stringer dimensions are given as width, 1¾ in., plus ¼ in., minus 0; length 48 in., plus or minus ⅛ in.; and height 3¾ in., plus ¼ in., minus 0.

The specifications state notch openings should be 9 in. wide and not closer than 6 in. from stringer ends. Stringer notches are cut to a depth of 1½ in. with round corners. "Center stringer should be parallel to and equidistant between outside stringers," according to the specifications.

The GPC recommendations detail how the pallet must be assembled and type of workmanship needed to meet specifications.

Licensing Program

GPC was created to establish a licensing program for pallets meeting the recommended specs, and pallets which are approved "should be marked on the exterior surface of one outside stringer, in letters of not less than 1 in., to clearly show that the pallet meets GPC standards, the manufacturer's designation, and otherwise conforms to pallet-marking specifications developed and approved" by GPC.

Program plans include educating and training personnel at all levels of grocery industry operations on proper purchase, care, repair and interchange of pallets.

Copies of the "Recommended Pallet Specifications for the Grocery Industry" are available from GPC, Suite 2026, 221 N. LaSalle, Chicago 60601. Single copies are free; price for 2-10 copies is $1, and for more than 10 copies, 10¢ each.

Ad Budgets from Sales Performance

"Advertising budgets are the result of product sales, not vice versa," according to Kenneth Mason, vice-president for grocery products, Quaker Oats Co.

Speaking at the American Advertising Federation convention, Mason based his opinion on research carried out by the firm to determine the actual relation between sales and advertising.

He said the studies indicated consumer value, not advertising cost, may be the real reason that national brands are priced above private labels.

Quaker found private labels, at least in one large metropolitan area, get substantial space in markets' newspaper ads. In another test, consumers preferred unmarked Quaker products to the leading private-label competitors.

Mason said the research showed there is "no relationship between advertising and pricing, at least in markets that are reasonably mature."

TV Ads Ineffective

To prove the surprising ineffectiveness of some television advertising, Quaker recently conducted its own telephone survey of viewers. Only 3 per cent of those viewing Quaker TV specials could recall the name of the sponsor. One per cent recalled the products advertised—but didn't remember the brand names.

"Ninety-seven per cent of the audience of these well-rated and regularly scheduled television shows didn't know what was being advertised," Mason said.

He cited two consumer-preference tests in which an unmarked Quaker breakfast product and pet food were matched against leading private-label products. Some 55 per cent of the consumers chose the Quaker breakfast product, 38 per cent preferred the private label and 7 per cent had no preference.

The Quaker pet product was preferred by 64 per cent of the customers, 27 per cent preferring the private label. Nine per cent had no preference.

Private Label

Even in "normal" marketing conditions, when advertising is assumed to be a factor in product preference, Mason said one should take into consideration the strong promotion that private labels are receiving in supermarket ads.

Quaker counted the number of advertising lines devoted to private labels in four major Chicago newspapers during the week of April 24-30. Packaged food linage in retail food ads totaled [illegible].841, with 37.1 per cent of that devoted to private labels.

It would cost a manufacturer about $36,700,000 to duplicate this newspaper advertising nationally for a year, according to Quaker's estimate. "Private label brands are not totally unadvertised brands, by any means."

ConAgra Has Loss

ConAgra, Inc., announced, in a preliminary unaudited statement, that it sustained a net loss of $11,853,118 for the fiscal year ended June 30, 1974, including a loss of $6,252,754 in the final quarter of the year. In the previous year, the company had net earnings of $6,062,928, including profit of $846,826 in the fourth quarter.