

**THE
MACARONI
JOURNAL**

**Volume 65
No. 8**

December, 1983

Macaroni Journal

0024-9894

DECEMBER, 1983



Season's Greetings



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The Macaroni Journal

Vol. 65
 No. 8
 December
 1983

Published monthly by the National Pasta Association, 139 N. Ashland Avenue, Palatine, Illinois. Address all correspondence regarding advertising or editorial materials to Robert M. Green, Editor, P.O. Box 1008, Palatine, Illinois 60078. Second-class postage paid at Appleton, Wisconsin and Palatine, Illinois.

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MACARONI JOURNAL

Subscription rates for one year:
 Domestic \$14.00 per year
 Foreign \$17.50 per year
 Single Copies \$2.00 each
 Back Copies \$2.50 each

Change of address and subscription inquiries: Address subscription correspondence to The Macaroni Journal, P.O. Box 1008, Palatine, IL 60078. Postmaster: Mail form 3579 notices to P.O. Box 1008, Palatine, IL 60078.

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Santa Claus Soup

Some of the most charming holiday traditions are whimsical creations of imaginative cooks. Santa Claus Soup is one of them, a Christmas Eve inspiration that has both merit and merriment.

The idea is to leave a mug or bowl of steamy, hot soup for Santa Claus. And of course, little children will want to leave their lists nearby as a reminder of what they hope to find under the Christmas tree. In setting out the soup, with a candle warmer handy, even the youngest in the family will understand that the real spirit of the season is in giving.

Santa Claus Soup is a perfect main-dish dinner soup for Christmas Eve, which parents sometimes think is the shortest evening of the year and youngsters are convinced is the longest. Appropriately colorful with green peppers and red tomatoes, the soup is brimming with ingredients that children love. Raisins, peanuts, shell macaroni and frankfurters — to name a few. Adults will be equally enthralled with the fresh vegetables and subtle herb flavoring of the good soup. But best of all, the cook will be relieved to know that Santa Claus Soup is begun by opening two handy cans of

condensed soup — old-fashioned vegetable and beef broth — so most of the work is already done.

Santa Claus Soup

- 1 can (10½ ounces) condensed old-fashioned vegetable soup
- 1 can (10½ ounces) condensed beef broth
- 2 soup cans water
- ½ pound frankfurters, sliced
- ½ cup uncooked small shell macaroni
- ½ cup chopped onion
- 1 medium green pepper, diced
- ¼ cup peanuts
- ¼ cup raisins
- 2 tablespoons chopped parsley
- ¼ teaspoon thyme leaves, crushed
- Generous dash pepper
- 2 medium tomatoes, diced

In saucepan, combine all ingredients except tomatoes. Bring to boil; reduce heat. Simmer 5 minutes or until done; stir occasionally. Add tomatoes; heat.

Makes about 7½ cups, 5 servings.

Cover Photo

For easy entertaining, consider chicken cacciatore with spaghetti. Fruit for dessert.

WORLD'S BEST PASTA

C. Robert Stephenson, Vice President and General Sales Manager, Con Agra, America's largest durum miller, has sent a press kit to food editors and key grocery personnel.

His message:

Lately you've been hearing that to make really good pasta you have to buy an imported brand.

Not so.

Naturally, as America's largest miller of durum for pasta, we think pasta makes a great story for your readers any time. But right now, with imports making inroads into American markets, we think it's especially timely.

Use our press kit any way you like. But please consider our overriding message. The world's best pasta is made right here in the good old U.S.A. bar none.

Some of the imports are excellent—no question—but no import can beat our American pasta. Here's why:

To make great pasta, you must start with only the finest wheat. No arguing that, since pasta consists only of durum wheat and water. And, the world's best durum wheat for pasta is grown right here in the United States, most of it in 19 counties around Minot, North Dakota.

Foreign pasta makers apparently agree—they bought more than 50 million bushels of American amber durum wheat last year.

With the aid of unfair Common Market subsidies, some of that wheat is coming back to us in the form of imported pasta—priced artificially low.

So what is it we want? Two things:

1. An end to unfair subsidies (a panel of the General Agreement on Tariffs and Trade supports our position).
2. An end to the myth of superior imported pasta. Nobody beats our American pasta because nobody can beat the amber durum wheat our American farmers grow—in the world's most ideal durum wheat country.

Pasta Wars — The Italians Vs. the Americans

The Italians say their pasta subsidies — expected to total \$7 billion in 1983 — are completely legal.

The Americans say the subsidies violate trade laws — and are allowing the Italians illegally to undersell American brands in the U.S.

A pasta war has been declared and both sides are marshalling their forces. To date, the Italians don't have a significant share of the U.S. market. But Italian imports are rising at a rate America pasta makers view with alarm — five-fold since 1980. In some Eastern cities, Italian products are taking over shelf space and sales.

The Italian manufacturers say the Common Market subsidies are legal because pasta is an agricultural product. The National Pasta Association, the U.S. trade group, insists that pasta is a processed agricultural product. International law prohibits subsidies for processed products.

American pasta makers are also disturbed that American consumers may view Italian pasta as somehow superior — somehow more authentic.

Joseph Viviano, Chairman of the National Pasta Association, said, "These are brand names that carry the foreign mystique of pasta's motherland, and they benefit from a subsidy of 10-15 cents per pound."

A panel of the General Agreement on Tariffs and Trade has agreed with U.S. pasta makers that the subsidies are illegal. That ruling is awaiting further action.

Meanwhile, the American pasta makers have asked President Reagan to enact quotas or duties on pasta imports if the subsidies continue.

The Americans complain that with the expansion of Italian imports their sales have stopped growing.

And so, the pasta wars continue.

A Short History of Pasta

First off, let's dispense with the two great myths of pasta history:

1. Marco Polo did not introduce pasta into Italy from China.
2. Fettuccine was not invented in Rome by a culinary genius named Alfredo for Doug Fairbanks and Mary Pickford.

The origins of fettuccine date well back into the dark ages, before Hollywood. And pasta itself owes its invention to some very enterprising cave persons.

Some 10,000 years ago, nomadic peoples accidentally discovered the

food value of wild wheat, began cultivating it and gave up their wandering ways.

Some time later, we're told, these prehistoric farmers toasted some of their wheat grains on hot stoves, then mixed them with water and ground them into a paste. And pasta was born.

The Chinese recorded the eating of pasta 5,000 years ago. And a bas-relief on an Etruscan tomb depicts an entire pasta-making outfit — some sixteen hundred years before Marco Polo ever set sail.

The eating of fettuccine and ravioli were known to antiquity. Legend has Italian sailors on long voyages eating leftovers stuffed into pasta dough. Their "rabiolo" literally meant leftovers — things of little value.

The great Roman poet, Horace, wrote enthusiastically of a grand supper featuring lasagna.

And a 1279 A.D. will of one Ponzio Bastone bequeaths a basket of macaroni to his lucky heirs, 13 years before Marco Polo's return. (Take note that even then, macaroni was highly prized.)

An official papal declaration on quality standards for pasta also survives from the 13th century.

So by the time Marco Polo and crew returned, pasta was pretty old stuff.

The shaggy dog version of the Polo myth casts a Chinese girl and an Italian sailor in central roles. While she flirts with her young Italian boyfriend, her neglected bread dough expands and somehow drying into long strips. Don't ask questions about myths.)

Meanwhile, back at the ship, the galley mate is boiling soup. On his return, the love-besotted sailor carries the doughly strips into the soup and pasta is born, to the rousing cheers of the starving crew. Marco Polo ordered several trunks full of pasta to take back to the motherland as souvenirs.

And the history of pasta marched on. In 1350, Boccaccio wrote in his "Decameron" of magic land where happy citizens gambled on mountains of cheese and ate free pasta to their hearts content.

An English cookbook of the same century describes a dish nearly identical to our Fettuccine Alfredo.

By the 17th Century demand in Italy for pasta was so great that assembly-line production was begun. Strong

PASTA SHAPES



Spaghetti



Vermicelli



Vermicelli Clusters



Linguini



Fettuccine



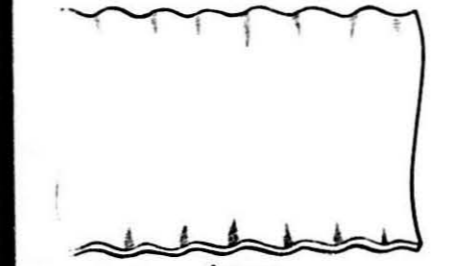
Narrow Egg Noodles



Medium Egg Noodles



Wide Egg Noodles



Lasagna



Ready Cut Spaghetti



Salad Macaroni



Small Macaroni



Large Macaroni



Jumbo Macaroni



Twirls



Small Shells



Large Shells



Jumbo Shells



Alphabets



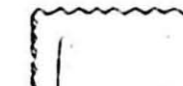
Dumplings



Cart Wheels



Bours



Ravioli



Rigatoni



Manicotti



Mostaccioli

men waded barefoot into the dough, no doubt imparting their own unique flavor. The much-kneaded dough was then forced through a trifila, or die, to create the finished product.

Each region had its own favorite shape and each shape was thought to have its own individual flavor even

when made from the same ingredients.

Whether you side with those who believe "macaroni" hails from "macaroni" — my precious darlings, or "maccari" — to pound, neither derivation applies to the macaroni of our Revolutionary War. In fact, when Americans were singing of Yankee

Doodle and the feather in his hat, they were twitting British dandyism. They didn't know a real macaroni from a rigatoni.

Enter another globe trotter — Thomas Jefferson. In Naples, the future President was fascinated by the

(Continued on page 2)

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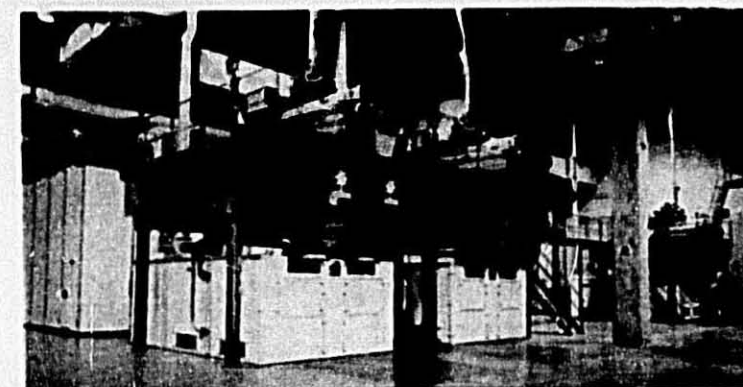
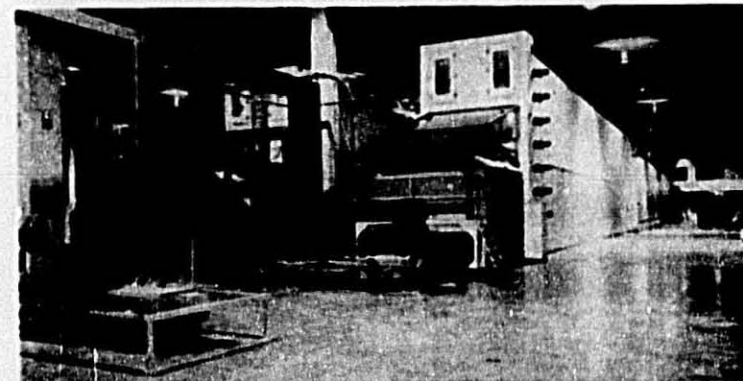
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- 4 in GERMANY
- 4 in U.S.S.R.
- 3 in VENEZUELA
- 2 in POLAND
- 2 in SWITZERLAND
- 1 in AUSTRIA
- 1 in BOLIVIA
- 1 in CZECHOSLOVAKIA
- 1 in FINLAND
- 1 in GREAT BRITAIN
- 1 in GREECE
- 1 in INDIA
- 1 in IRAN
- 1 in HOLLAND
- 1 in RUMANIA
- 1 in TURKEY

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

. . . besides innumerable lines operating at INTERMEDIATE TEMPERATURE

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"HIGH" Temperature
to be considered,
the preference
of the customers
is



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World's Best Pasta

(Continued from page 5)

local pasta industry (as he was fascinated by all things) and ordered four cases of "maccaroni" and a pasta-making machine to be shipped to the New World. Back home, he served his new-found delicacy to a few fortunate friends.

But it took more than Jefferson's curiosity for pasta to catch on in the U.S. It took imported Italians. Millions of them. The first U.S. pasta factory wasn't founded until 1848. And big-time commercial pasta-making waited until floods of Italian immigrants created a demand before the turn of the century.

Business finally took off for good when Italian imports were banned during World War I.

Whither pasta? Today it is more popular than ever, with U.S. per capita consumption at an all time high. The spaghetti we all eat every year would reach to the moon and back hundreds of times. But who's counting?

The Italian Futurists were dead wrong when they denounced pasta in their cookbook "La Cucina Futurista." They insisted that Future Man would prefer a diet of pills to pasta. Fortunately for us their brave new pasta-free world was only a bad dream.

A Pasta Fact Sheet

- Pasta, from the Italian word for paste, is an edible paste made of Semolina and water.
- Semolina is milled from the heart of durum wheat, the hardest and purest of all wheats. Durum wheat is heavy with gluten, the principal protein compound of wheat. ("Women's Day Encyclopedia of Cookery")
- More than 600 pasta shapes are commercially available worldwide — some estimates indicate more than 1,000 shapes.
- A two-ounce serving of dry pasta supplies the following U.S. Recommended Daily Allowances for adults:

Protein	10%
Thiamine	30-35%
Riboflavin	15%
Niacin	15-20%
Iron	10%

 (National Pasta Association)
- A five-ounce serving of pasta (cooked) contains 210 calories, 7 grams of protein, 41 grams of

carbohydrate and only one gram of fat. The sodium content of pasta is less than 0.5 milligrams per serving when cooked in unsalted water. (USDA Agricultural Handbook, Consumer Reports)

- Pasta contains six of the eight essential amino acids; it is deficient only in lysine and is marginally deficient in threonine. When consumed with meat, cheese, sauce or butter, the protein value of pasta is enhanced. ("The Great International Noodle Experience" by Karen Green)
- In 1981, Americans inhaled more than 2 billion pounds of pasta — more than 9 pounds for every man, woman and child. (Time Magazine). The spaghetti consumed in a very hearty meal would stretch nearly 150 feet if laid end to end. ("The Complete Book of Pasta" by Jack Denton Scott)
- Uncooked pasta can be stored for up to one year in the dark under normal conditions without significant nutrient loss. ("Journal of Food Science")
- Eighty percent of durum wheat grown in the U.S. is grown in North Dakota. (Crop Reporting Board)
- The U.S. exported 50.8 million bushels of durum wheat in 1982, with 36% going to Algeria and a total of 44% going to France, Italy, The Netherlands and Venezuela. (Crop Reporting Board)
- In America, Easterners buy more long goods (spaghetti, etc.) while Midwesterners consume more cut goods, such as macaroni. Stamped shapes — bow ties, stars and sea shells — are usually found only in cities with a substantial Italian-American contingent.

For more information, please contact: Joe Lichtenberg, National Pasta Association, 1901 North Fort Meyer Drive, Suite 307, Arlington, VA 22209, (703) 841-0818.

Celebrities on Pasta

- Sophia Loren:**
"Spaghetti can be eaten most successfully if you inhale it like a vacuum cleaner."
- James Coco:**
"When I'm really happy, I have to have pasta. When I'm really depressed,

I have to have pasta. Even when I'm dieting, I have to have pasta."

Alma Adams:

"The true pasta person remembers specific dishes for many years and continues not only to see them but smell and taste them long after what was said and done on those occasions has been forgotten."

"... I chronically suffer from a serious pasta deficiency. I must have those happy noodles slapping against my insides or I begin to look wan and lifeless."

Sophia Really Did Say It!

Pasta has been given credit for many things, but responsibility for the many assets possessed by Sophia Loren is one of the finest! Up to this point, many skeptics thought the quote attributed to Sophia Loren was a creation of a sharp NPA publicist.

But *Time*, in the Special Anniversary Issue, "The Most Amazing 60 Years in History," issued in early October, verified the quote in the *People* section on p. 160. The article says:

1956: The New York JOURNAL-AMERICAN tapped Italy's billowing Cinemactress Sophia Loren to guest-write a column. In carefully fractured English, Sophia (or a waghish ghost) ground out some profound pap. Sophia's advice to American girls: "Everything I've got I got from eating spaghetti. You try it."

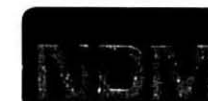
Italian Grains Down

Grain production in Italy for 1983 is estimated at 18.1 million tonnes according to the weekly roundup of world production and trade issued by Foreign Agricultural Service of the Department of Agriculture. The projection is down slightly from 1982 production.

Wheat production in Italy is estimated at 5.8 million tonnes, 3% below last year's harvest, while the durum crop is forecast at 2.9 million tonnes, about the same as a year ago. Corn production is forecast at 6.8 million tonnes, virtually unchanged from a year ago. Record-high July temperatures reduced corn yield prospects particularly in the Venice area and the eastern region, where almost half the corn is grown.



the durum people



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AMERICAN ATTITUDES ABOUT FOOD NUTRITION AND DIET ARE CHANGING, WHEAT INDUSTRY COUNCIL STUDY REVEALS

Only one in five American food shoppers is actively interested in nutritional information on food product labels, according to a nationwide survey released today by the Wheat Industry Council. The vast majority—85%—of consumers are more concerned with the price of food and the ingredients in specific products.

Food, Nutrition and Dieting: a study of American attitudes, habits perceptions and myths, was conducted for the Wheat Industry Council by Riter Marketing Research of Maryland and Market Facts of Chicago. Funding was provided by a grant from Universal Foods Corporation of Milwaukee, Wisconsin. The representative sampling of 3,368 consumers was weighted to represent current U.S. population statistics, based on data from the U.S. Bureau of the Census.

"The findings are surprising and enlightening," Ray Davis, Chairman of the Wheat Industry Council, said at a news conference in Washington, D.C. "Americans have serious misconceptions about nutrition and calories in foods, and American shopping, eating and dieting habits are changing significantly."

The study reveals that consumers are more concerned than ever about nutrition — yet they generally ignore nutritional information on food labels, paying more attention to unit pricing and product dating. When they read a food label, they look for information on the amount of sugar, calories, salt and additives rather than nutritional value.

According to Charles Riter, whose firm conducted the research: "What the food industry may consider common terms, such as fiber, minerals and 'enriched' are only understood by about half the population. The other half readily admit they don't understand what the terms mean. More than 90% of the people surveyed would prefer the use of generic terms on food labeling."

Misconceptions

"Among the misconceptions shared by many Americans are those relating to wheat and wheat based products," Riter said. "Consumers generally feel positively about wheat itself as a source of roughage and fiber, and describe it

as one of the 'good for you' elements of food. But, when wheat is used as an ingredient in food products, consumer awareness of its nutritional value drops sharply. The reason this occurs for many wheat-based products relates to the perception of other ingredients and their role in the diet. For example, sugar, salt and fat."

White bread, English muffins, pizza and pasta products were all viewed as less wholesome and less natural than wheat itself, despite their predominantly wheat content. Consumers see wheat bread as having less starch, fewer calories and more nutritional value than white bread, although white bread and wheat bread are nearly identical in calorie contents and ingredients. Among the non-wheat foods, consumers give high rating to fresh fruits, eggs, ground beef, chicken and whole milk for being high in nutrition value and desirability.

The average consumer considers himself well informed about nutrition, becoming more concerned with eating a balanced diet as he gets older. Interest in nutrition and health is greatest among women.

Among consumers highly concerned about nutrition, including those on weight control diets, the most frequent areas for cutbacks on food consumption are breads (except wheat bread), pasta, sweets, pizza, meat (except ground beef), and non-diet soft drinks. These nutrition minded consumers have increased their purchase of poultry, wheat bread, fish, and fresh fruits and vegetables.

The Wheat Industry Council study reveals that few consumers are aware of the actual calorie content of foods, despite a high level of concern about health and dieting. Consumers over-estimate calories in most foods, sometimes by as much as six times the actual content. Even such common items as milk were popularly thought to contain far more calories than they do.

Surprising Trends

Among the surprising trends identified by the survey are those relating to eating habits, Riter explained. "Only about two of five Americans eat the traditional 'three square meals a day'. One quarter say they are 'very likely' to skip either breakfast or lunch on

any given day," he said. "Eating a balanced diet is a major concern of only a little more than one third of the American public, but nearly half are concerned about eating too much sugar or salt."

Despite increased public attention to exercise, only one in two Americans exercises regularly as part of a personal fitness program. By contrast, more than two thirds indulge in snacking between meals.

Evidence of the main meal breaking down is quite visible — especially in families with children and where both adults work.

Even the way Americans shop for food is changing. As women enter the work force, men are entering the supermarkets, involving themselves in grocery shopping as never before. More than 40% of the married adult male population is now involved in food shopping.

Significant regional differences in food shopping and eating habits have been uncovered by the Wheat Industry Council study. The most striking divisions occur between East and West. Eastern consumers pay more attention to product dating, use more white bread, and buy more egg noodle than those in the West. Western buyers show more concern with "health foods" and fresh food products, and are less interested in redeeming store coupons in their buying patterns.

The Wheat Industry Council, according to Council Chairman Davis, plans to use the information gained in the study as a basis for future education programs to correct some of the myths about wheat products and promote consumer awareness of food and nutrition.

Davis, who is a Nebraska farmer, says "The American lifestyle is changing. Those of us in the food industry, who supply so much of what is basic to American life, must evolve as well."

The Wheat Industry Council, established by the U.S. Congress under the terms of the Wheat Foods Research and Nutrition Education Act, includes all U.S. manufacturers of products in which wheat is a major or characterizing ingredient, with the exception of retail bakers and small product manufacturers. The Council is headquartered in Rockville, Maryland.

THE MACARONI JOURNAL



Experts don't kid around when it comes to digging into good-tasting, nutritious pasta dishes.

**You can't kid
a real
spaghetti
expert.**

Sure, it has to look good, and of course it has to taste delicious.

But even a 7-year-old "expert" probably doesn't know how pasta gets to tasting so good. That's why it's good to have Amber Milling around. Our milling and quality control experts make sure your pasta operations have a reliable source of semolina and durum flours milled from the choicest durum wheats... Venezia No. 1 Semolina, Imperia Durum Granular, or Crestal Fancy Durum Patent Flour.

Amber also makes it easier to control your production schedule by meeting your specs and making shipments when promised.

When it comes to eating pasta, everybody's an "expert." When it comes to making good pasta products, you're the expert; and when it comes to making good semolina and durum flours, Amber's an expert. Call Amber, now!



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Age Important in What Consumers Think and Do About Food

In a recent consumer study, the Wheat Industry Council found that age is an important factor in developing attitudes about food, nutrition and dieting. As Americans progress from childhood through middle and old age, they generally become more concerned with maintaining a balanced diet, avoiding excessive use of certain foods, and eating enough of the foods which are nutritious and high in fiber.

The *Food, Nutrition and Dieting* study was sponsored by the Wheat Industry Council with a grant from Universal Foods Corporation. The survey results found significant behavioral differences among various age groups.

In the course of a typical trip to the supermarket, older people are more likely to read food ads, make lists and check dates on products than younger shoppers with larger families. The pressures of work and family life leave little time for younger consumers to prepare for their shopping trips. Older people are also more likely to pay attention to nutritional labels and use the information to compare brands. The average person who purchases fresh baked products at the in-store bakery is usually somewhat older and has children living at home.

As might be expected, interest in the cholesterol, fat and sodium content of food increases with age, with the greatest concern shown by consumers over age 65. Yet the elderly are less concerned with the vitamin or calorie information on a food label than are younger shoppers.

Consumption Related to Age

When consumers rated different foods for frequency of use, it was apparent that consumption of certain foods is related to age. The most frequent buyer of white bread usually is under 45 years old with children under the age of 18. The wheat bread buyer is also under 45 with children but has a somewhat higher income. People who buy English muffins regularly are in the 24-45 age bracket.

Frequent users of spaghetti, macaroni and egg noodles are usually under 54 years old and have at least one child under the age of 18 living at home. Desserts, wheat-based sweet goods, donuts, snack cakes and fruit pies are also popular with consumers

under the age of 54 who have children at home. In general, the various sweet and snack foods are seen as convenient, enjoyable snacks for children.

Many consumers in the Wheat Industry Council survey indicated that they are on a diet, although most do not have a specific program that they follow. As might be expected, weight loss dieting is more common among women (33% vs. 15% of men), particularly among teenaged girls. Among teenagers, girls are three times more likely than boys to go on a weight loss diet.

About one in every ten consumers is on a diet for medical reasons. This group is older, usually 55 years old and up.

Attitudes Affected by Age

Attitudes about eating habits are also affected by age. Nearly six out of ten adults claim that they try to eat a balanced diet, but aren't obsessed with it. In contrast, teenagers have a more blasé approach to food—nearly half say they eat whatever they like, without concern for nutritional value. One-third of the teenagers try to eat what's right, but don't get very involved in the effort. It's no surprise that adults generally don't see their teenaged children as being well informed about nutrition.

Concerns of the Elderly

When analyzing consumer concerns about health and general diet habits, it is clear that the elderly, compared to younger consumers, are more concerned with the following things:

- Maintaining a balanced diet with three meals a day, including breakfast.
- Avoiding specific foods with too much fat, sugar, cholesterol or nitrates.
- Avoiding the excessive use of meat or coffee.
- Getting enough fiber in the diet and eating foods that aid regularity.
- Staying away from snacks and sticking to a balanced diet.
- Being able to relax, and getting enough rest.
- Making sure food is fresh, and drinking enough milk. (Areas of concern which the elderly share with younger consumers.)

The Wheat Industry Council research on various aspects of wheat-based foods and carries out a national program of nutritional research. Created by the 1977 Farm Bill and established by Congress in 1981, the Council consists of members from all areas of the wheat industry—manufacturers, producers and millers—as well as consumer representatives.

Use of Pasta Products

The survey found most consumers serve egg noodles, spaghetti or macaroni in their homes during a four week period, but few are familiar with or purchase fresh pasta.

Various pasta products are served in different ways even though each is seen as being similar in terms of calories, ingredients, and nutritional value. All are considered alternatives to potato and rice. Macaroni is used primarily as an ingredient for casseroles, served both hot and cold as a main or side dish. Spaghetti is not considered as versatile as macaroni and is served mostly as a main dish. Egg noodles are used mainly for casseroles and soups.

In response to NPA's question about the most significant finding about pasta, Charles Riter said, "Pasta consumption falls off with age and decreased household size. It probably relates to convenience."

Myth: Spaghetti Is Fattening. High in Starch and Low in Nutrition

Fact: A five-ounce serving of spaghetti with tomato sauce contains only 163 calories — yet the average consumer thinks that this popular dish has 394 calories. Several studies of weight loss regimens indicate that breads, pasta and other complex carbohydrates — rich foods are included in the diet, people feel satisfied and satisfied. Spaghetti also has many positive nutritional benefits. As a wheat product, it is a good source of B vitamins, iron and trace minerals. Pasta has almost no fat or cholesterol and has the same number of calories per gram as proteins, and almost half the number of calories per gram as fat.

Did You Ever Wonder?

"How was spaghetti invented?"
"Some guy used his noodle."

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Salute to the Mid-Atlantic States

History and tradition are saluted this month by the *Macaroni Journal*.

Old Dominion

The first permanent English settlement in America was in Jamestown, Virginia, in 1607. In 1619 the first legislative body in the New World was established here. This was the beginning of the system of representative government in the Western Hemisphere.

Virginia, named by Sir Walter Raleigh in honor of Elizabeth, who was called the Virgin Queen of England, is also called the Old Dominion, since this name was used in many early writings. The capital of the Colonies prior to the Revolutionary War was at Williamsburg. Here gracious living was the hallmark of the early plantation days, and the bounty of rich agricultural areas contributed to the tradition of good eating.

Virginia hams, famous the country over, are produced from hogs raised in the peanut growing section of the Tidewater. Southern cooking in all its glory is found here.

North and South

To the north in Maryland, named for the wife of Charles I, the English ruler who granted the territory now known as Maryland and Delaware to the first Lord Baltimore, is famous for seafood, dairying, and agriculture. To the lover of seafoods, Maryland means Chesapeake Bay. It ranks among the leading states in the marketing of strawberries and truck crops. Research facilities of the United States Department of Agriculture at Beltsville have produced such triumphs as the Beltsville Turkey, particularly succulent for holiday feasting.

The Carolinas were part of the territory granted to Sir Robert Heath by King Charles I of England in colonial times. North Carolina today is known as the Tarheel State, because the state once produced vast quantities of tar, pitch and turpentine. Today it leads the nation in the growing of tobacco.

South Carolina, the Palmetto State, named for the palmetto trees which grow in large numbers along its coast, is a land of rare beauty and charm. South Carolina colonists tried grow-



Turkey in the Straw

ing many crops such as oranges, tea, olives, and mulberry trees. They were very successful in growing rice and indigo, and these two products became their chief plantation crops. Cotton has become important today, and South Carolina competes with North Carolina for first place in the manufacture of cotton goods.

Holiday Feasting

Christmas time was the most important of all holidays in colonial times as well as in plantation days. In addition to the religious observances there was feasting and merry-making. There was visiting back and forth and always the hospitality of good food.

While poultry and ham occupy the top spots in the holiday menu, macaroni products in various forms have graced the well set table. Vermicelli in the consomme sharpens appetites for the feast to come. Side dishes of buttered noodles or macaroni and cheese run competition to candied yams and mashed potatoes for favor. Egg noodle dressing has become an interesting variation in filling for the fowl.

But the greatest contribution of macaroni, spaghetti and egg noodles is in the wonderful combinations it affords in the use of leftovers after the

big dinners of holidays or week-ends. One such recipe for the tasty serving of leftovers is Turkey in the Straw.

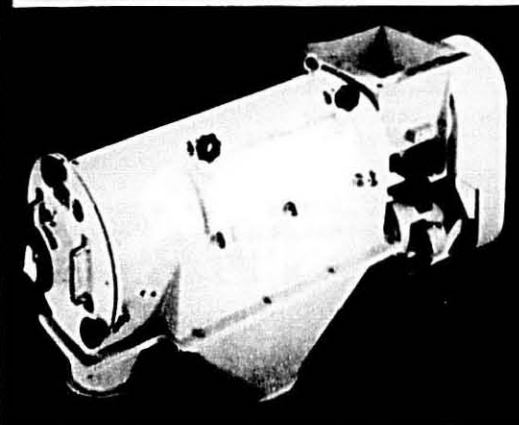
Turkey in the Straw (Makes 4-6 Servings)

- 1 tablespoon salt
 - 3 quarts boiling water
 - 8 ounces fine egg noodles (about 4 cups)
 - 3 tablespoons butter or margarine
 - 1½ tablespoons all-purpose flour
 - 1½ cups milk
 - 2 cups grated processed Cheddar cheese (about ½ pound)
 - 2 canned pimientos, chopped
 - 1½ cups diced, cooked turkey
 - 1 10-ounce package frozen asparagus thawed and diced
- Salt and pepper to taste

Add one tablespoon salt to rapidly boiling water. Gradually add noodles so that water continues to boil. Cook uncovered, stirring occasionally until tender. Drain in colander. Arrange around outer edge of greased (3½ and one-half quart) casserole.

Melt butter or margarine and blend in flour. Gradually add milk and cook, stirring constantly, until thickened. Add cheese and stir until cheese is melted. Add remaining ingredients and mix well. Turn into center of casserole. Bake in moderate oven (350 degrees) 30 minutes.

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FRESH PASTA HELPS CATEGORY GROW

From Chain Store Age/Supermarkets, July 1983

"Pasta and rice, that's a nice" might have been the byword in supermarkets this past year. What rice did for the dried vegetable category this year, macaroni, spaghetti and pizza mix did for pasta.

The entire pasta category was up 13% in 1982 to \$999 million, but certain subsegments rose meteorically.

Last year retailers saw sales rise 58% on spaghetti dinners, 52% on noodle mixes and 63% on pizza mixes. The most dramatic declines were registered by macaroni prepared dinners without cheese, noodle dinners without meat, just plain old regular spaghetti, and noodles with sauce mixes. All other players in the category were quite healthy.

Undoubtedly, the category was helped by the wave of new "fresh" pastas that have hit America. Apparently the consumer's appetite and ima-

gination are being stimulated by fresh pastas, but the realities of their pocket-books are keeping shoppers relatively dependent on the dried pasta. They seem to be eating more of both types, but dried, because it is usually much cheaper than fresh, gets purchased more frequently.

Says one manufacturer of domestic dried pasta: "The novelty of fresh will win a lot of converts and hopefully will increase overall consumption, but I don't think fresh will ever knock dry out of the marketplace. And for one reason: price."

"When a customer buys an 8-oz. package of dry for 39¢, she actually gets a pound of cooked pasta at that price. But when she buys 8 oz. of fresh at \$1.19, it actually costs her \$2.38 a pound."

Another pasta manufacturer adds, "Dehydrated has longer shelf life—1½ years vs. 10 days for fresh if it's refrigerated. There may be more gross

profit on fresh, but there's also more labor—plus the cost of equipment."

Supermarkets are expecting a more favorable review of bulk pasta, another 1983 phenomenon.

Usually, some 15-20 items are displayed in 100-lb. barrels. Most are dummied so there are only 10-20 lb. of product in each barrel. Even with a 4% shrink factor, margins average 21%-22%, which is close to a trade-off with packaged.

The big attraction of bulk is price. A California chain sells elbow macaroni in bulk at 45¢ a pound vs. 76¢ for a national brand (packaged), and bulk spaghetti at 39¢ a pound vs. 79¢ for packaged.

Because of the space required for the barrels (there are other bulk foods in addition to pasta), a store must be at least 25,000 sq. ft. In one

(Continued on page 20)

Pasta Products 1982 Performance — \$2 Million Supermarkets

CATEGORY	SALES				PROFIT		ASSORTMENT MARGIN	
	% of Dept. Sales	1982 Dollar Volume (Millions)	1981 Dollar Volume* (Millions)	% of Diff.	% of Dept. Gross Profit	Gross Profit (Millions) (cents)	Items/Brands/ Sizes or Wts.	Avg. Gross Margin (% of Retail)
Macaroni Dinners	15.03	\$150.18	\$148.12	-10.66	11.21	\$ 26.91	9	17.9
With Cheese	11.37	113.60	106.18	-6.99	7.90	18.97	6	16.7
All Other Macaroni	3.66	36.58	41.94	-40.93	3.31	7.94	3	21.7
Noodle Dinners	3.46	34.66	\$1.32	-32.45	4.07	9.79	8	28.2
With Meat	1.73	17.33	14.16	22.39	2.06	4.96	3	28.6
All Other Noodle Dinners	1.73	17.33	37.16	-53.35	2.01	4.84	5	27.9
Spaghetti Dinners	3.08	30.80	19.47	58.19	2.87	6.90	5	22.4
With Meat	1.54	15.40	10.62	45.01	1.37	3.30	3	21.4
All Other Spaghetti Dinners	1.54	15.40	8.85	74.01	1.50	3.60	2	23.4
Noodle Mixes	1.35	13.48	8.85	52.32	1.42	3.41	2	25.3
Macaroni	18.11	181.00	157.51	14.91	19.15	45.96	33	25.4
Elbow	8.67	86.65	74.33	16.57	8.81	21.14	13	24.4
All other Macaroni Dinners	9.44	94.35	83.18	13.43	10.34	24.81	20	26.0
Noodles	22.93	229.13	189.27	43.86	22.35	54.14	35	23.4
Flat	10.98	109.75	95.56	14.85	11.61	27.88	16	25.0
All Other Noodles	11.95	119.38	63.71	87.38	10.94	26.26	19	22.0
Spaghetti	22.35	223.35	215.90	3.45	24.37	58.51	26	26.2
Regular	14.84	148.26	161.04	-7.93	16.36	39.29	16	26.1
All Other Spaghetti	7.51	75.09	54.86	36.88	8.01	19.22	10	25.6
Meat Extenders	0.39	3.85	3.54	8.76	0.43	1.03	1	26.8
Pizza Mix	3.47	34.66	21.24	63.18	3.68	8.84	7	25.3
One-Pot Dinners to Which Fresh Meat/Fish Is Added	6.36	63.54	47.79	32.96	6.46	15.49	13	24.4
With Noodles or Macaroni	2.12	21.18	17.70	19.66	2.10	5.04	4	23.8
With Rice	0.58	5.78	3.54	63.28	0.64	1.53	2	26.4
All Other One-Pot Dinners With Meat/Fish Added	3.66	36.58	26.55	37.78	3.72	8.93	7	24.4
Noodles With Sauce Mixes	1.93	19.25	21.24	-9.36	2.12	5.10	5	26.3
All Other Pasta Dinners	1.54	15.40	8.85	74.01	1.67	4.00	3	26.0
Total	100.00	\$999.30	\$883.10	13.16	100.00	\$240.09	147	24.0

% of total store volume . . . 0.52%.

* Adjusted to reflect the latest update of Bureau of Census figures.

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Chain Store Age Report

(Continued from page 16)

Foods Co. southern California store, for example, grocery and general merchandise were trimmed, and the in-store bakery was eliminated to accommodate 270 barrels, 19 of which house pasta products.

Imports Grow

In 1982 imports became one of the fastest-growing pasta subcategories.

A veteran exec for a regional pasta manufacturer explains: "According to the National Macaroni Institute, there were one-third more imports the first three months of 1982 than in a comparable period in 1981. And imports, because they are delivered store-door by distributors, are not reflected in warehouse movement."

Italian pasta receives a subsidy of 7¢-10¢ a pound from their Government, and this helps them undersell the United States product by 10¢-15¢ a pound.

The East is being hit hardest by imports because they're boxed and the East is a boxed market. The price gap between domestic and imports narrow as the distance to market grows. For example, it costs 10¢-15¢ a pound to ship imports to the West Coast. "Remember," says a manufacturer, "Italy subsidizes the wheat, not the freight."

Prepared Dinners

Growth in the category is coming primarily from prepared dinners, which indicates that the convenience generation is alive and well. Golden Grain has introduced two new items in its Noodle Roni line: light lasagne and chicken-flavored. At present these two products are distributed only in the West.

Another tip-of-the-hat to convenience is Kraft's Macaroni & Cheese Deluxe Dinner, which retails at \$1.19, compared to 35¢ for the 7¼-oz. size. Why are people willing to pay more than three times as much for Deluxe? Because the complete sauce is in the package—no need to add margarine and milk.

Kraft has been testing its Macaroni & Spice Mix in the West and Southwest and will make a marketing decision after this summer. The product, packaged in a 7-oz. box, appeals to warm-weather salad consumers.

Generics Lose Ground

Generic pasta is losing ground—down to 2% of the market—while

private label pasta is holding at 18%.

A pasta manufacturer explains the decline in generics: "Price is less critical now that the economy is turning around, but more than that is the quality: Generic is made from flour, while private label and regional brands are made from durum wheat."

Lo-cal pasta is on a slow-growth pattern. An expert says it's because "people talk lo-cal but don't necessarily buy it. There is no built-in demand—it moves only as long as it's promoted."

The villain in the calories count is the sauce. That's why Ronzoni is pushing its Lite 'n' Natural sauce in five varieties, and why it has expanded from its New York-Philadelphia metropolitan base to Virginia upstate New York and California.

Generics Losing Momentum

Generics appear to have lost their momentum, and name brands are winning back some of the share they gave up during the period when rising prices in food stores were making "price" brands more attractive. This is the conclusion of the latest report on generic and private labels from Selling-Areas-Marketing, Inc. Private labels also lost share, according to the report.

During the year ended May 27, sales of generic labels totaled \$2.6 billion, up \$400 million, or 18.4%, from the corresponding 1982 period. There are generic labels in 325 product categories, or 73% of the 447 categories monitored by SAMI.

Among food warehouse operators that have been carrying generics since November, 1979, generics lost 1.3 share points on a dollar basis for the 12 weeks ended May 27, compared with the 1982 period, to 6.5% from 7.8%. On a unit basis, there was a decline of 1.9 points, from 11.1% to 9.2%. Regular private label lost 0.4 point in dollar volume, to 12.5%, and 0.3 point in unit volume, to 15.7%, for the period.

Looking at all food store operators who were handling generics as of May 27—not just those who carried them in November, 1979—SAMI found that generics had gained 0.1 share point, to 5%, in dollar volume, but held share at 7% in unit movement. However, "all other brands," which includes national brands, increased in

share on a unit basis and dollar basis because private label lost share during the period.

Regular private label fell 1.1 share points, to 13.7% in dollar volume, and 1.2 share points, to 16% in unit volume. Paralleling this, all other brands gained one percentage point, to 81.3% in dollar volume, and 1.2 points, to 77%, in unit volume.

As for food operators who were not offering generics as of May 27, all other brands increased share on a dollar basis by 0.6 share point, to 83.6%, and 0.9 share point on a unit basis, to 80.2%—in both cases at the expense of regular private label.

SAMI compared its data with projected total U.S. volume in every category where generics are found. According to SAMI's projection, all other brands gained some share from regular private brands in both dollars and units for the 12 weeks.

Regular private label fell 0.8 point, to 15.3%, on a unit basis and 0.9 point, to 18.3%, on a dollar basis. All other brands increased 0.7 point, to 81.6% on a unit basis and 0.9 point, to 77.5%, on a dollar basis. Generics gained 0.1 point, to 3.1%, on a unit basis and stayed even at 4.2% on a dollar basis.

Following are the categories with the highest projected national dollar volumes for generic labels in each of the departments, as well as their market shares.

DRY GROCERY, FOOD

Category	Annual Dollar Volume (\$1,000s)	Annual Dollar Share (%)
Dry Dog Food	\$75,982	4
Peanut Butter and Combinations	64,381	7
Regular Soft Drinks	45,861	5
Cooking & Salad Oils	41,545	3
Jams, Jellies and Preserves	41,237	7
Pasta	38,695	4
Granulated Sugar	35,662	2
Solid Shortening	32,542	7
Ready-to-Eat Cereal	32,323	0

DRY GROCERY, NON-FOOD

Category	Annual Dollar Volume (\$1,000s)	Annual Dollar Share (%)
Toilet Tissue	121,000	6
Paper Towels	96,733	7
Household Plastic Bags	83,427	8
Heavy-Duty Detergents	60,651	2.3
Paper Napkins	45,614	12.8
Disposable Diapers	41,875	2.6
Paper and Plastic Plates	34,553	9.6
Facial Tissue	34,310	5.7

THE MACARONI JOURNAL

Larger Food Stores

Food stores are becoming larger and fewer in the U.S., as in other countries as customers use them to buy delicatessen, fast foods and a variety of non-food items in accordance with their changing life styles.

These and other findings were detailed in an A. C. Nielsen Co. report at the annual convention of the International Association of Chain Stores (CIAS), in Madrid, Spain.

In 1982, the report showed, U.S. consumers spent 64.3% of their grocery store dollars in chain outlets with more than \$1 million in weekly sales, an increase of 1.3 percentage points over the 1980 level. The share taken by chain outlets with a lower turnover rose marginally from 4.4 to 4.8%, while that of the independents slipped from 32.6 to 30.9%.

Sales Follow Size

Among the chain stores, a Nielsen chart showed sales growth between 1980 and 1982 was directly related to store size, with the biggest one registered among outlets of more than 24,000-sq.-ft., which accounted last year for 25% of the locations and 58.2% of total chain store volume. In the previous year, they had accounted for 22% of the locations and 51.5% of overall chain store volume.

Consumer spending actually declined as a percentage of the total for stores of less than 20,000-sq.-ft. and with volume of less than \$6 million a year. It showed little or no increase for stores under 3,000-sq.-ft. and with turnovers of less than \$500,000 a year.

The report estimates that last year 21% of the 44,100 chain grocery stores in the U.S. had an annual volume of more than \$1 million. They averaged 6.2 million in annual turnover and 7,592-sq.-ft. in size, compared with averages of \$412,000 and 1,731-sq.-ft. for the smaller stores.

Combination stores, whose annual volume in 1980 was an average of \$13,188,000, represented 0.3 of the 179,000 grocery store outlets in the U.S. last year, but they took 3.7% of the \$206.6 billion spent by U.S. consumers in all kinds of grocery store formats, the report said. Their 1980 volume was more than three times higher than the \$4,069,000 earned by traditional supermarkets, which represented in 1982 17.8% of the outlets

and 62.9% of total grocery store sales.

The superstores accounted for 1.2% of the outlets, but 11.6% of the total business, with an average 1980 volume of \$11,950,000. The average 1980 volume for the warehouse stores was \$5,993,000 and last year they represented 0.8% of the outlets and 4.3% of total sales.

Limited-item stores were 0.3% of the outlets and earned 0.8% of the grocery business and convenience stores accounted for 18.9% of the outlets—more than conventional supermarkets—but only 6.2% of total sales, with an average 1980 volume of \$379,000. The remaining small stores averaged \$198,000 in 1980, and in 1982 they still represented 60.7% of the outlets, but only 10.5% of the business.

Trend to Larger Stores

Edward R. Case, a Nielsen vice president, said he could not immediately provide comparisons for previous years and projections for the expansion of the new formats, but he said they would show a "definite" pickup in the number of stores with more than 25,000-sq.-ft.

American consumers spent 12.1% of their grocery store dollars in these larger stores in 1981, more than doubling the share in 1976, he said. The percentages were higher in eight other countries, however, with France and Mexico at the top with 38.7 and 31.4% respectively, followed by Britain's 19.7%.

Case said also the supermarket's share of consumer spending was higher from one year earlier in all 20 countries polled by Nielsen, where comparisons were available. Supermarkets were defined as grocery outlets of between 4,000 and 25,000-sq.-ft.

Changing Patterns

In analyzing the U.S. consumers' changing buying patterns, the report said as many as 60% of the chain outlets with annual sales of more than \$1 million were equipped with delicatessen departments in 1982, up from 50% five years ago.

Also in 1982, 52% of all U.S. chain grocery stores sold some type of fast foods, including 87% of all the convenience stores of less than 3,000-sq.-ft. Fast-food departments were installed in more than 67% of all the outlets

of 20,000-sq.-ft. and over, but comparative figures for previous years were not provided.

More General Merchandise

The Nielsen study confirmed also a trend toward more space and sales being allocated to a large variety of general merchandise categories in chain grocery stores with annual volume of more than \$1 million. "It's likely that this pattern of more space for nonfood will continue, especially as superstores and combination stores expand in number to accommodate consumer desires for more items under one roof," Case said.

In 1982, health and beauty aids were at the top with a total of 576 linear ft. of shelf space, followed by greeting cards (228 ft.), kitchenware (121 ft.), stationery and school supplies (86 ft.), books (84 ft.), and housewares (71 ft.).

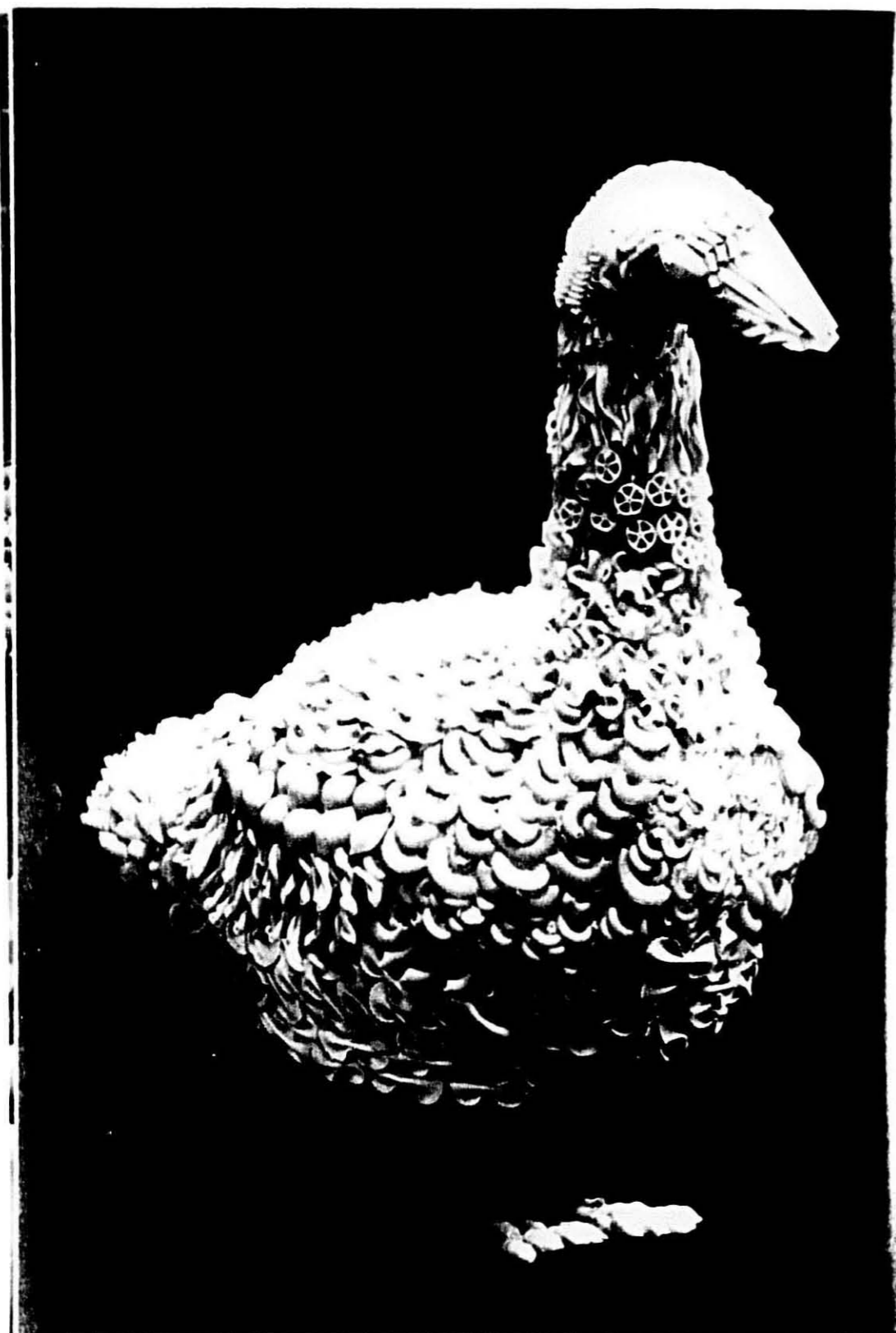
By way of comparison, among the packaged goods, pet foods took up 254 ft. of shelf, soft drinks 228 ft., detergents 125 ft., FTE cereal 109 ft., and coffee 80 ft.

About 23.3% of every dollar spent at retail in 1982 was spent in food stores, up from 23% in 1981. With the exception of eating and drinking away from home, whose share rose from 9.4 to 10%, all the other major retail sales categories recorded lower growth or declines, even though the price of food eaten at home increased by only 3.4%, less than those of most other major merchandise categories.

1982 Saw 3% Growth

In fact total U.S. consumer purchases in grocery stores had a real growth of 3% in 1982, Nielsen estimates, the highest of the past five years. Grocery stores managed to hold a 69.7% market share against food away from home, whose sales had a real growth of a 4%, down marginally from a 70.1% market share in 1977.

Part of the growth in grocery store turnover was accounted for by accelerated real growth in packaged goods and by sustained real growth rates for selected health and beauty aid categories, the report showed. After a sluggish performance in 1980, and a much better one in 1981, only paper products and beverages had real growth of more than 3% out of the main grocery commodity groups.



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McKesson Shifts Gears

McKesson Corporation signed a letter of intent to acquire SKU Inc. for less than \$10,000,000. McKesson's plan to buy the closely held distributor of programs for personal computers signals the entrance of corporate giants into the software distribution industry.

McKesson's purchase is likely to change the software-distribution industry. "Until now, software distribution has been largely a cottage industry," said David Malmberg, McKesson's director of new technology and the chief strategist behind the acquisition. McKesson hopes to change that by offering retailers McKesson's automated order-entry systems and other proprietary services. McKesson's drug-distribution operation serves 16,000 outlets, including mass merchandisers and supermarkets.

Thomas E. Drohan, president and chief executive officer of McKesson, noted that the SKU acquisition, which still must be approved by both companies boards, is part of McKesson's program to broaden the scope of its distribution activities. The company formerly CPC International Inc. said it agreed to buy C.F. Mueller Co., one of the country's biggest pasta makers, from McKesson Corp. for \$125 million.

CPC to Buy Mueller

The purchase is expected to be completed in a few weeks after a definitive agreement and approval from the government and the boards of CPC and McKesson.

CPC, a food processor and corn wetmiller, markets brands such as Hellmann's mayonnaise, Skippy peanut butter and Thomas' English muffins. World-wide sales in 1982 were about \$4.1 billion. McKesson makes and distributes drugs, health-care products and chemicals.

Jersey City, N.J.-based Mueller, according to industry estimates, had \$115 million in sales in 1982 and after-tax profit of about \$8 million. It has 23% of the national pasta market but does business in only 22 states, mostly in the Northeast, Southeast and Midwest.

Food analysts suggested CPC may try to expand the Mueller brand the way it marketed the once-regional brands of Skippy and Hellmann's.

Robert J. Cummins, an analyst at Wertheim & Co., said the acquisition

might help counterbalance CPC's dependence on foreign earnings; CPC gets 60% of its sales overseas.

San Francisco-based McKesson, formerly known as Foremost-McKesson Inc., had revenue of \$4.08 billion in fiscal 1983, ended March 31. The sale of Mueller is in line with McKesson's announced strategy of focusing its efforts on distribution businesses and related computer technology, said Thomas E. Drohan, McKesson president and chief executive officer.

Last December, the company sold its Foremost Dairies operation. The company said it will remain in the bottled-water business, but it hasn't decided whether to keep two other small food businesses.

McKesson bought Mueller in 1976 for \$115 million from a trust that had been run for the benefit of New York University.

Record Year for General Mills Canada

General Mills Canada, Inc. reported another record performance for the fiscal year that ended May 1, 1983.

John D. Herrick, Chairman of the Board said, "This year's gratifying results are due to the commitment to risk and the aggressive pursuit by all divisions of development, testing and successful introductions of new products."

Net earnings were \$12.0 million, a gain of \$2.5 million or 26.0 percent over the previous year on record setting consolidated sales of \$207.8 million.

Herrick also announced that an application to establish a new Red Lobster restaurant business was approved by the Foreign Investment Review Agency (FIRA) and he expects the first restaurant to be opened in Windsor, Ontario in November, 1983.

Major operating highlights included Big G cereals outpacing overall cereal market growth by three times with Cheerios the fastest growing cereal among the top ten brands in Canada; Lancia pasta similarly grew at three times the rate of a buoyant pasta market; Blue Water Seafoods continues to offer the widest variety of convenience seafood; Eddie Bauer achieved sales growth for the ninth consecutive year, despite the unseasonable winter weather; Parker Brothers successfully entered into the popular video game software business with the introductions of

8 video game cartridges for the Atari V.C.S. system and introduced more than 100 new products at the 1983 Canadian Toy Fair.

General Mills Gains

Strong volume gains by established as well as newer businesses were major contributors to record sales and earnings by General Mills, Inc., in fiscal 1983, according to the company's annual report. Company officers point out that 22.2% of fiscal 1983 sales were generated by products developed internally during the past five years and that there has been a 4.4% average annual growth in Consumer Foods unit volume during that period, more than twice the rate of total food industry growth.

General Mills in the fiscal year ended May 29, 1983, achieved net income of \$245.1 million, equal to \$4.89 per share on the common stock, up 9% from \$225.5 million, or \$4.46 per share, in fiscal 1982. Sales in fiscal 1983 totaled \$5,550.8 million, up 5% from \$5,312.1 million in the previous year.

General Mills in the fiscal year ended May 31, 1981, had net income of \$196.6 million, equal to \$3.90 per share on the common stock, on sales of \$4,852.4 million.

"These results represent the 21st consecutive year of increase in earnings before extraordinary items," it is stated in an overview by H. B. Atwater Jr., chairman of the board and chief executive officer; F. C. Bloodgett, vice chairman, Consumer Foods, and F. Swanson, vice-chairman, Restaurants and Non-Food Operations.

Good Year for Bakery Flour

Strong volume growth was achieved by cereals and baking mix specialties, the report says. "General Mills," commercial flour had a good year, and mill capacity utilization was excellent," it notes. "Grain merchandising results trailed last year but overall performance was satisfactory in a depressed industry environment."

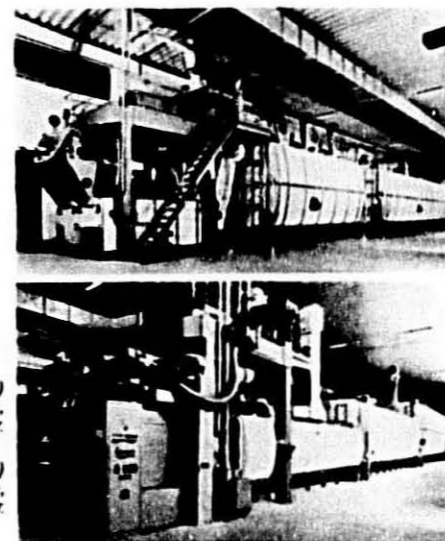
Earnings for General Mills, European food operations exceeded those of 1982 in spite of the negative effect of foreign exchange translation. Biscuiterie Nantaise, the French specialty cookies and snack company, was restricted by national price controls and a devaluation of the franc. "Neverthe-

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General Mills Gains

(Continued from page 24)

less, the company achieved local currency earnings equal to last year," the report says. "Sales growth of extruded snacks continued and share leadership in both the snacks and sandwich cookie markets increased during the year."

In Canada, the Lancia-Bravo pasta operation posted earnings growth on the strength of record volume and market share growth. Flour milling operations in Latin America, the report says, achieved record earnings despite continuing economic and political problems affecting the area. Export operations, it adds, continued to produce excellent results.

J. M. Semple to Retire

J. M. Semple will retire in May 1984 as head of RHM Holdings (U.S.) Inc., which comprises the U.S. operations of Ranks Hovis McDougall P.L.C. Chosen to replace him as head of the company's American business is Bryan Gibbs, who since 1982 has been managing director of the RHM grocery division in the United Kingdom.

Mr. Semple, a veteran of the RHM organization, has been a member of the main board of directors since 1972 and has headed the U.S. operations since 1979. He reaches retirement age next year.

Mr. Gibbs will come to the U.S. in January 1984 to begin taking over his new responsibilities.

RHM Holdings (U.S.), which has its headquarters in Chicago, manages RHM's businesses in the pasta and specialty foods fields.

Its operations include Indian Summer, Inc., a producer of apple juice, cider and vinegar with five plants; Gioia Macaroni Co., Inc.; Merlino's Major Italian Foods Co.; Ravarino & Freschi, Inc., and The Red Wing Co., Inc.

Lundgaard Elected Vice President of Cargill Flour Milling Unit

Lin Lundgaard has been elected a vice president in Cargill's Flour Milling Division.

Lundgaard, who is national sales manager for the division, was vice president for sales with Seaboard Allied Milling when Cargill acquired Seaboard's domestic mills in 1982.

Lundgaard is a director of the American Bakers Association (ABA) and a member of the Allied Advisory Council of the ABA, the American Society of Bakery Engineers and the National Pasta Association.

He is a graduate of the University of Chicago.

ConAgra Report

ConAgra, Inc. achieved record first quarter sales and earnings in the 13-week period ended August 28. Net earnings in the quarter totaled \$12.3 million, equal to 63¢ per share on the common stock, up from \$8.5 million, or 55¢ per share, in the year-ago first quarter.

Weighted average shares outstanding in the first quarter was 25% above the year-ago period, due primarily to the merger with Peavey Company, whose results were included for the full first quarter this year compared to one month of the year-ago first quarter. Sales in the quarter aggregated \$754.7 million, up 23% from \$613.2 million a year ago.

Charles M. Harper, chairman and chief executive officer, commented, "We are particularly pleased with record first quarter results because conditions have been unfavorable in some of our industries. We are not looking for much near-term change in ConAgra's overall industry environment, so our reported earnings per share for fiscal 1984 won't reflect the company's trend line or underlying earning power. Nevertheless, we continue to expect record earnings for the full year."

Improved flour milling and feed ingredient merchandising results supported ConAgra Grain Processing Companies' earnings gains. United Agri Products increased earnings even though acreage reduction programs constrained pesticide markets.

Peavey Grain Companies' depressed results reflected difficult grain merchandising industry conditions, ConAgra said.

The board of directors of ConAgra, Inc., on September 22 voted to raise the quarterly dividend on the common stock to 28½¢ per share, up 14% from the previous dividend of 25¢. The new rate is effective with the dividend payable December 1 to shareholders of record on October 28.

Multifoods Earnings Cu

Net income of International Multifoods Corp. declined in the second quarter ended Aug. 31 due to the significant devaluation of the bolivar in Venezuela. Earnings totaled \$1,161,000, equal to 75¢ per share on the common stock, off from \$8,063,000, or 98¢ per share, in the second quarter a year ago.

Sales aggregated \$254,298,000, off from \$266,599,000 a year ago.

"Our operations continue to exhibit their fundamental strength, with worldwide volume up 5%," Andre Gillet, president and chief operating officer, said. "I'm particularly pleased with the second quarter earnings trends from our operations in the U.S. and Canada, and the excellent operational job our Venezuelan team has done in coping with price controls and currency devaluation."

William G. Phillips, chairman and chief executive officer, commented on the Venezuelan situation as follows:

"Devaluation of the Venezuelan bolivar relative to the U.S. dollar during the second quarter negatively affected U.S. dollar reported earnings in our International geographic area, which were lower than last year by 39¢ per common share.

"Again this quarter, transactions we made in U.S. dollars and bolivars to protect our exposure to devaluation successfully offset 14¢ per common share of that decline, for a net effect of 25¢ per common share. The devaluation also made it necessary to write down our investment in Venezuela by a direct charge to stockholders' equity of \$10 million, based on a rate of 125 bolivars to the dollar, which under current accounting rules does not affect earnings."

In reviewing second quarter operations, Mr. Gillet said results from family flour in Canada and peanut butter in the U.S. continued to be depressed. The Venezuelan devaluation, he said, caused Consumer segment earnings world-wide to be down.

"Canadian performance continued to be excellent, and flour and prepared mix volume was strong in Venezuela and the U.S.," he said of Industrial operations. "Durum and bakery mix margins were disappointing in the U.S., though we expect improvement in the second half. The segment declined overall principally due to bolivar translation."



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



Marvin E. Winston

PASTA ENRICHMENT—HISTORY AND UPDATE

by Marvin E. Winston
President, Winston Laboratories, Inc., and
Doctoral Student at Rutgers University

a maximum level. For example, Thiamine levels are to be between 4.0 and 5.0 milligrams per pound, Riboflavin between 1.7 and 2.2 milligrams per pound, Niacin between 27 to 34 milligrams per pound and Iron between 13 and 16.5 milligrams per pound. This represents a 25 percent leeway over the minimum required level and acknowledges the difficulty of always being exactly at a given nutrient level.

It is of interest to note that for different products such as bread, rice and pasta the government has distinct and different enrichment levels. This is predicated upon consumption patterns, enrichment losses during cooking, and the refusal, for instance, of some people to consume yellowish rice. In fact, only about two and a half years ago a change was made to reduce the Riboflavin content in rice because of objections to its color.

The pasta industry, of course, would be delighted to get permission for an increase in Riboflavin enrichment because in addition to its activity as a vitamin, it has a beautiful yellow naturally occurring color and enhance the product's appearance.

In recent times, some macaroni manufacturers have even requested their farinaceous suppliers to add slightly more Vitamin B₂ ostensibly for nutritional purposes. This should not be done since it is illegal, and sooner or later will lead to problems.

It Is Mandatory?

A question often asked by the younger middle manager or executive is, "Do we have to enrich our products?" In fact, enrichment is required by several states including New York, New Jersey, Connecticut, Pennsylvania and California. If a manufacturer does not want to sell its products in these states, it does not have to enrich its products but may not sell its products "enriched." Since most products now contain nutritional labels, an unenriched product does not favorably compare with its enriched counterpart. Suffice it to say, the vast majority of pasta sold in the United States do contain Vitamin and Iron enrichment.

The regulations called for the establishment of both a minimum level of nutrient in the product as well as

What Does It Cost?

What are industry costs for improvement of food nutrition? Two prominent suppliers, Vitamins, Incorporated of Chicago, Illinois and Roche Chemical, of Nutley, New Jersey estimate food fortification costs, per serving, as follows:

0.002¢	for proposed Vitamin D levels in Pasta
0.57¢	for 100% of the U.S. RDA for 12 Vitamins
0.14¢	for 25% of the U.S. RDA for 12 Vitamins
0.139¢	for 100% of the U.S. RDA for seven Vitamins (Vitamins A, C, B ₁ , B ₂ , B ₆ , 12, and Niacin)

Vitamins, Inc., incidentally, has been an Associate Member of the National Pasta Association and National Macaroni Manufacturers Association for over 20 years and supplies vitamins, minerals and defatted wheat germ to member companies.

Ingredient Legend

The regulations do not require macaroni manufacturers to place an ingredient legend on their packages. This is because noodles and macaroni products are incorporated in the Federal Standard of Identity which delineates what ingredients may be used and how products must be labeled. An important point to note however, is that if a manufacturer is keeping a listing of ingredients on its package, and it is using enriched flour or enriching regular flour itself, the actual enrichment compounds utilized in its formula must be on the label in predominance by weight from highest to lowest.

Chemical Compounds

Vitamins are also chemical compounds and misuse can cause sickness. The July 8, 1983 issue of the "Journal of the American Medical Association" reported on Niacin intoxication at a brunch due to an approximate 60 fold addition of Niacin to the flour at the local bagel establishment. The hospital emergency room, where the sick



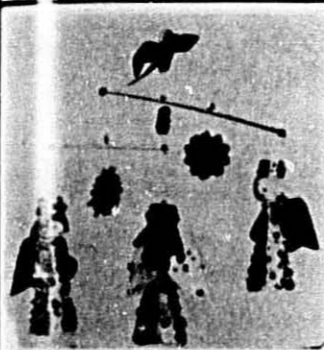
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Pasta Enrichment

(Continued from page 28)

were treated, reported that symptoms were of relatively short duration and everyone fully recovered. Interestingly enough, the subsequent investigation revealed that the large quantity of Niacin had apparently been added from an improperly labelled container! [Could this happen at your plant?]

Is It Necessary?

Is it necessary to take additional steps to improve our nations' health? Dr. Paul La Chance, Nutritional Professor at Rutgers University declares that a real problem exists due to low dietary levels of Vitamin B₆, Folic Acid, Magnesium and Zinc. These should be considered in addition to the four nutrients already added to bread and pasta. The National Academy of Sciences (1974) in their book entitled "Proposed Fortification Policy for Cereal-Grain Products" explains a logical need for additional vitamin and mineral enrichment. The point is made however, that the technical feasibility of adding additional nutrients has to be made to determine the stability, nutrient availability and influences from the addition to consumer acceptance as it affects color, odor, flavor and shelf-life.

Most recently, in the April 19, 1983 "Federal Register," FDA proposed increased use of Vitamin D in foods including pasta at a maximum level of 90 I.U. per 100 grams. Industry was invited to send their questions or comments to FDA which some companies did. The outcome should be available soon.

Dietary Guidelines for Americans

- Eat a variety of foods
- Maintain ideal weight
- Avoid too much fat, saturated fat, and cholesterol
- Eat foods with adequate starch and fiber
- Avoid too much sugar
- Avoid too much sodium
- If you drink alcohol, do so in moderation

Comprehensive Food-Safety Legislation

Comprehensive food-safety legislation that for the first time defines "safety" as it applies to food additives

has been introduced in both House and Senate.

Sponsors had hoped for earlier action, but hearings confirmed broad division between industry, the scientific community and consumer interests. The latest version is being offered as being considerably more acceptable to conflicting interests.

As prepared by Sen. Orrin Hatch (R. Utah), chairman of the Senate Labor and Human Resources Committee, and introduced simultaneously in the House by Rep. Edward Madigan (R. Ill.) the bill accepts the premise of two former Food and Drug Commissioners that present food safety laws are "basically sound" and what is needed is "fine tuning" to bring those laws into conformity with scientific and technical change.

Last Overhaul in 1958

Hatch noted that since the last major overhaul in 1958 the food-safety laws have "stood still," while technology has changed greatly.

"Laws that were designed for the science in 1958," he said, "are no longer entirely appropriate for the science in 1983."

Perhaps most significantly, the new legislation defines safe as "a reasonable certainty that the risks of a substance under its intended conditions of use are negligible." This would apply to food additives, color additives, substances that are "Generally recognized as safe" (GRAS), pesticide residues, and residues of new animal drugs.

The controversial Delaney clause, which gives the regulatory agencies no leeway when a substance is found to cause cancer in laboratory animals, would not be repealed under the latest food-safety legislative proposals. Instead, the bill retains Delaney but provides flexibility by specifying that FDA would not have to ban the offending substances where these are demonstrated to FDA's satisfaction, based on a specified set of criteria, to present no more than "a negligible risk." Under such criteria, it is clear, saccharin could remain on the market.

Other Key Provisions

Other key provisions of the food-safety legislation are as follows:

—FDA would have power, under specified conditions, to gradually phase out substances from the food supply where it determines that there will be

no "unreasonable risks" from continued use of a substance during the phaseout period, and no practical substitute is available.

—FDA could consider the health-related benefits of a food additive in deciding whether to allow continued use of a substance that has a long history of use and no practical substitute.

—FDA would be required to set up a mechanism for receiving external scientific advice whenever the FDA commissioner feels this would help solve substantial scientific issues.

—The bill provides for clarifying the criteria and procedures for regulating so-called "indirect additives," such as packaging materials.

—Procedures for setting tolerances for food contaminants would be simplified.

—The bill conforms the Federal Meat, Poultry and Egg Acts, enforced by USDA, to the changes in the Food Drug and Cosmetic Act. This includes providing for independent scientific peer review and authorizing a phase-out under these agricultural laws. When Sen. Hatch introduced the earlier food-safety bill two years ago it was attacked as too sweeping or unbalanced—or a gutting of existing law—depending on whether it was industry or consumer interests doing the evaluation. Hatch explained that the new measure, responding to this criticism, concentrates on fine-tuning existing law because it does not presently permit FDA and USDA to consider pertinent scientific information in their decision-making.

Witnesses during the hearings pointed out, "While we can scientifically distinguish between significant and trivial risks, we have a latitude to make such distinction in our regulatory policy under current law. Many noted it is unrealistic to expect us to achieve a zero-risk food supply."

Hatch represents the revamped food safety measure as bipartisan. It already has attracted support from Republicans and Democrats.

A National Restaurant Association survey shows 4 out of 10 adults say they have increased consumption of fruits, vegetables or whole grains and decreased consumption of sugar, fat or salt when eating in a restaurant.



Emanuele Ronzoni

Emanuele Ronzoni, founder of the Ronzoni Macaroni Company, Long Island City, New York, learned to make pasta in his mother's kitchen in San Fruttusa Italy. He came to the United States in 1881 at the age of 11. About a year later he got a job as a helper in a small macaroni factory on the lower east side of New York. The entire operation was done by hand, and his pay was \$2.00 a week. Mr. Ronzoni recalls: "I learned a little bit at a time. The foreman didn't know much more than I did, but I thought they were great men in those days. Things were different then, and everything was done by hand. And the \$2.00 a week looked pretty big. "New York was a different city in those gone days, too, for the youthful immigrant. Horsecars, gas lamps—the thrill of watching the Brooklyn Bridge rise over the East River—sold papers in the vicinity of the Brooklyn Bridge before it was opened in 1883," Mr. Ronzoni said. "After it was opened, I crossed the bridge for a penny."

After learning what he could on the \$2.00 job, he moved on the \$12.00 a week in a macaroni factory in Brooklyn on Wyckoff Street. "I twisted through all day long," he said.

To save carfare, he walked—some 40 minutes—from the ferry to the factory. By 1888, at the age of 18, Ronzoni was working in another factory at Sackett and Van Brunt Streets, when a blizzard that is still talked about to this day hit. His recollection was that he got

Pasta Makers in America

RONZONI — SONO BUONI

to work on the Catherine Street ferry after walking down from his home in the vicinity of Chatham Square and that the boss let them off early that day.

First Shop in 1892

He opened his first shop with a partner about 1892. "Just a small loft off the Holland Tunnel where it now comes into Manhattan. Many times we wouldn't even go home at night," Ronzoni said. "I worked while my partner took a nap, and he worked while I took a nap. We had a big stove to dry the macaroni, and we had to watch it to keep the right temperature. Saturday night we would go home. That is how we pulled through."

After modest successes, he joined with two other partners in forming the Atlantic Macaroni Company which had the famous Caruso brand when Enrico Caruso was popularizing pasta with the American public. In 1895 this company moved to Burnham Avenue, Long Island City, where Mr. Ronzoni spent 19 years as production head.

In 1915 Emanuele Ronzoni decided to go it along with his own company starting the Ronzonia Macaroni Company with a modest sized factory at 35th Street and Northern Blvd., Long Island City.

Before World War I, durum wheat semolina, from which the best pasta products are derived, was unknown in the United States. Most macaroni products were imported from Italy. World War I disrupted the importation of manufactured pasta products as well as the availability of machinery needed for its manufacture. However, these obstacles were overcome, and the domestic business prospered as American machinery manufacturers saw the potential and made equipment to satisfy the growing need of this new industry.

Incorporated in 1918

By 1918 Ronzoni Macaroni Company was incorporated under the state of New York. Because of the untiring personal devotion of the founder and a determined will to produce the best quality pasta, the business flourished. Italian immigrants began to find satisfaction with Ronzoni brand products, especially Genoa-style macaroni (fancy cut shapes) for which the Ronzoni



Emanuele Ronzoni, Jr.

brand became most popular. At that time pasta was considered to be only an ethnic food purchased in bulk and consumed chiefly by Italian-American people.

In 1925 when volume of business demanded new and larger quarters, construction started on a new plant. Mr. Ronzoni was joined by his growing family, two daughters and later by three younger sons. The company continued to grow under the leadership of the three sons: Emanuele Jr., who became executive vice president; Angelo, who was production vice president; the youngest son Raymond who was in charge of sales. During this period Ronzoni started consumer packaging instead of the traditional 20-pound wooden case.

After another 35 years passed, the elder Ronzoni found himself building his third plant in Long Island City, a large modern structure at 50th street and Northern Blvd. It was opened in 1950 and the next door neighbor was Republic Steel. The story is told that when the address of the new plant was mentioned to a trade magazine editor, he asked, "Isn't that the plant right next to Republic Steel in Long Island City?" "Well, yes," Ronzoni conceded, adding, "but I have said 'Republic Steel is right next door to Ronzoni! After all," he joked, "our sales of macaroni products top Republic Steel's sales."

Significant Growth

It was during the following two decades that the company achieved its most significant growth under Emanuele Ronzoni, Jr. who became president after the death of his father in 1956. With his brother Angelo, a brother-in-law, Felix Casareto, who

(Continued on page 34)

RONONI — Sono Buoni

(Continued from page 33)

ran the shipping department, and Roger Di Pasca, who became assistant to the president and general counsel, the company grew to be the number one seller in the largest food market in the country—the New York area.

In the new plant Ronzoni was the first to go from the batch method of manufacture to a continuous operation employing the most modern methods. Angelo Ronzoni created many new mechanical innovations and shapes which were patented and influenced many of today's production methods.

Advertising Boosts Sales

Radio and television helped Ronzoni change the eating habits of millions. Prior to World War II Ronzoni was just another obscure brand name among some 30 different macaroni brands throughout the northeast United States distribution area. Then they became a heavy user of regional air media, and sales shot up and distribution broadened.

Girard Benedict, Ronzoni's advertising and sales manager in 1955, told Sponsor Magazine: "Radio has done an excellent job of reaching Italian-Americans through foreign language shows, to maintain our high sales level at a low media cost per thousand. In fact, our Italian language radio show is nearly 24 years old, and on the air continuously."

"In recent years, television has been particularly effective for our line of macaroni products. It has done a wonderful job in persuading viewers to try Ronzoni. At the same time, through TV, we have been able to demonstrate a quality and appetite appeal of Ronzoni, to show new ways to prepare Ronzoni products, and to educate people about Ronzoni's nutritional values in their diet."

Radio and TV line-ups were carefully planned to accomplish the company's twin objectives: creating an increasingly large market of non-Italians while at the same time strengthening its position with the solid core of Italian-Americans who bought its products.

Here is how they defined their problems: "(1) lack of familiarity with the product. Many non-Italians think of 'macaroni' only in its usual 'spaghetti' form—smothered in tomato sauce and surrounded by meat balls. They are



The Ronzoni Family. (seated left to right): Ralph, Comptroller; Emanuele, Jr., Board Chairman and President; Ronald, Vice-President, Sales; (back row, left to right): Robert Secretary; Alfred, Vice-President, Production; Richard, Vice-President, Ronzoni Foods Division; and Emanuele J., Traffic Manager. Visible in the picture is the special plaque in memory of the founder, Emanuele, Sr.

unfamiliar with the various bows, shell, wagon wheel, cockscrew, and twist shapes that macaroni can take. They may never have heard of marinara, mushroom, or anchovy sauce. They don't know how to alter taste and appearance of the food by mixing it was chicken livers or shrimp, for example. Ronzoni had to educate much of the public to the many varieties of macaroni before he could sell them.

"(2) keen intra-industry competition. There were at least a dozen well known company brands competing with Ronzoni in the northeast. With some housewives, brand selection was a hit-or-miss proposition. Ronzoni wanted to build recognition for its trademark by convincing consumers it had a distinct advantage over other brands. It was the macaroni preferred by Italian-Americans, 'the people who know macaroni products best.' The company claimed its products were preferred by Italians by 2 to 1 compared to the nearest competitor."

All radio and television commercials included the Ronzoni slogan, "Ronzoni, Sono Buoni" which means "Ronzoni is so good."

Recognizing the need for good authentic Italian sauce, in 1965 the company bought a small sauce business in

Brooklyn which became a springboard for the facility opened in 1968 in Hicksville, New York.

To promote the sauce an advertising campaign in New York subway was launched with the caption: "The Ronzoni family makes spaghetti sauce in their factory the same way they make it at home. They just make extra. Pictured were Emanuele Ronzoni, Jr. with his sons and nephews: Ralph, Ronald, Robert, and Richard."

In 1980, when Emanuele Ronzoni, Jr. was 76, he assumed the position of Chairman of the Board and named Robert Ronzoni, his youngest son, as President and Treasurer of the company. His oldest son, Richard, was named vice president in charge of the prepared food division. Nephew Alfred was named vice president in charge of production. Ronald Ronzoni was named vice president in charge of sales, Emmanuel Ronzoni, vice president in charge of transportation, and Ralph Ronzoni secretary and comptroller of the corporation.

Fortune Magazine about that time ran a story on the difficulties of sons in family businesses, but they couldn't get the Ronzoni boys to say anything that wasn't complimentary about the relationships within the Ronzoni organization.



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The Family in Business

by Frank M. Butrick, Akron, Ohio

Part XV — I Will Never Retire

Bully for you. In this world full of men brainwashed into thinking themselves useless by 60 or 63, it is good to find men who reject retirement, who intend to continue as long as their health permits. The entrepreneur pays dearly for the ticket; if he wants to ride to the end of the line, who should say "No" to him? Many men have devoted their lives so exclusively to their businesses that they had no time to develop major avocations or other interests which would make their retirement attractive—or at least palatable. Usually the fascination of the family business itself was the only lure; yet sometimes the business became a quiet refuge from an unpleasant marital situation. But regardless of the reason, it is not all uncommon to find an owner or president who has wrapped his life so completely around his business that he cannot visualize being separated from the firm. And why should he? There is no divine law (and no federal law—yet) which says a man must retire at some arbitrary age. As long as a man wants to work—and can work—he should.

But there is a worm in this rosy apple. And this is your son's career. If you bring him along to be your second-in-command (as is the typical case), then you throw his life away; he will always be a vice president and never a president. And even if he does have enough stamina to trot along behind you from age 25 until his late 50s or early 60s, he would be too old to change his ways and become a dynamic president; then the best you could hope for would be a sort of fumbling, benign caretakership. That is not a very attractive prospect for either one of you.

Further, heading up a company gives to a man an inner toughness, a heat-treatment so to speak, which often bestows long life; vice presidents seldom benefit from such strengthening early trials. Thus a tireless and long-lived father may well find his son worn out and ready to retire before he does himself; he may even outlive his own son. In such a case, the father must look to

his grandson as his successor—not his son. The president steps out at 80 or 85 or later and the grandson is 30 or so, ready to take over, and chomping at the bit to charge at the world. In this arrangement the son's only role is as a stabilizer for the grandson, so intelligent tax planning would have the estate pass directly from the grandfather to his grandson (skipping one full layer of taxation—at his widow's death), and the son would not even wind up as heir.

Can anything be done to give a son a productive and satisfying life without prostituting him to his father—and yet without the father sacrificing himself through an early retirement for the sake of his son? The answer is yes—but you cannot procrastinate forever, continuing along without thoughtful Life Planning, until sheer cussedness or stubbornness makes it impossible for you to attend to what should have been done years before. If you are in good health, have every reason to expect a long life, are too busy to be ill, and do not plan on retirement, then you must either urge your son to look elsewhere for his career—or arrange meaningful opportunities for him to develop his useful presidential ability, parallel to your own. Discarding the former is inconsistent with the desires of both father and son, the latter provides definite advantages:

First, if things go well for you and you are indeed still president when your grandson is old enough to take over, then your son has had the opportunity to a productive and satisfying career as president of his own venture. Second, if your life or your ability should be cut short, your son could merge his business back into the parent firm and head up the combined venture, secure in his proven presidential ability. It is ironic that setting up a suitable arrangement is neither difficult nor very expensive. It merely requires deciding that your son's life is important enough to you to warrant expending the effort at the appropriate time—when he is between 30 and 40 (and you are probably at the busiest and



Frank M. Butrick

most productive stages of your own career—and are thus the most occupied elsewhere in your business)

Case History #1

This indefatigable founder of a major prosperous pasta manufacturing company retired when his health failed at the age of 87; his son, 65, had become a senile paper shuffler who hoped against hope to wind up president someday. He did—for seven months, until he suffered a stroke. So the grandson then 35, took over as the president. The father's will leaves control to the grandson president and there is more than adequate life insurance and outside investments to cover the estate taxes so this business will not be destroyed when the founder passes away. The grandson is much like the founder—an aggressive, ambitious, and very competent man. He will do very well indeed just as did the founder.

But the son, the man in the middle, spent his entire life as an employee under his hard-driving father. Most men spend their lives as employees. But this son might have had the ability to run the company, to make decisions and to see his ship in action. Nobody will ever know how well he might have done.

Case History #2

During the late 20s, a Chicago man founded a manufacturing company, fought for survival through the depression, built it up during WWII, and had developed it to a very profitable \$20 million in sales volume when he died at his desk. Age: 82. But his son, 57 at the time, already had nearly 20 years of experience as the head of his own successful firm—a once nearly defunct competitor which the father picked up as a gift for the son's 40th birthday.

At that age, the son was all ready to take over his father's firm—and the father could foresee the rust and frustration which would set in during the following years. So the son received the gift when analyzed its sales volume, financial status, and production. He discussed his conclusions and ideas with his father, and went to work. He proved his competence by accomplishing a turnaround in 18 months and then sprinting to \$12 million in sales. When the father passed away, the son moved into the top slot of the father's large firm—and a grandson, only 31 at already his grandfather's VP sales, stepped across to become the president of the smaller business.

And most interesting of all, there are two other grandsons, both now in their early 20s, and their father and older brother are already developing a plan for progressing them through the two firms, as preparation for heading off future acquisitions.

Observation: The founder in the second example left a legacy of ability, ambition, strength, planning—and a happy, united family, enjoying the fruits of his foresight. How did he differ from the founder in the first example? In only two simple—but all important ways: First, expecting to run his business as long as possible just for the sheer fun and satisfaction of seeing how big he could get it, he did not have enough time to foresee and understand the dilemma of the son backed behind an unaging father.

Conclusion

It is most incredible how few business owners give any thought to the time when their desire to stay with their business and the son's readiness to take over its management will collide. It would appear that an entrepreneur should either become a father about the age of 10, so he and his son could be partners, or delay his family until he is 40 or more so that their age differential was great enough to let the father retire or become unable to continue at a time when the son is still young and ambitious. But since nature selected to make most men fathers in their mid 20s, it is inevitable that the interests and goals of a father and a competent, aggressive son will eventually conflict. And when this happens, the pressure begins to build. After a few years it reaches an almost intolerable level. The son goes on, in stale-

mated desperation, and the father finally becomes too old to get to work—or dies at his desk. Then a burned-out son takes over, torn between joy over his long-awaited promotion, regret about the years wasted running in place, and guilty that he should be so pleased by his father's passing. Is this the future you want?

Durum Import Demand Gains

A "significant" increase in import demand for durum this 1983-84 crop season is expected to propel trade to a new record of 5 million tonnes, according to the International Wheat Council. Durum trade this season was projected by I.W.C. at 5 million tonnes, compared with 4.6 million shipped in 1982-83. Trade in 1981-82 totaled 4.8 million tonnes, while the 1980-81 aggregate was 4.2 million, the latter being the first year above the 4-million-tonne mark.

The rise in demand was attributed by the Wheat Council to reduced crops in the European Community and North Africa.

"Imports into the E.C. are projected to increase to 1.2 million tonnes, against 1 million in the previous year, mainly because of reduced output in Italy, where the quality of the crop is also lower," the I.W.C. said.

"Shipments of durum wheat to Africa are forecast to rise to a record 2.1 million tonnes, up from 1.6 million in the prior year, because of increased needs in Morocco, Algeria and Tunisia.

"Imports by the U.S.S.R. are expected to decline slightly, to 1 million tonnes, from 1.2 million in the previous year, because of improved domestic output."

This prospective rise in import demand coincided with a 10% reduction in world durum production, which led the I.W.C. to say:

"The sharp fall in production in North America will considerably tighten available supplies. In the U.S. combined opening stocks and production are estimated at 5.8 million tonnes. Exports are projected to increase to 1.9 million from 1.2 million in 1982-83, which will lead to a significant drawdown in stocks.

"In Canada, supplies available for export will be considerably reduced after last year's record shipments of 2.8 million tonnes and the smaller

1983 crop. Exports are forecast to decline by 0.2 million to 2.6 million tonnes."

The I.W.C. estimated world durum production in 1983-84 at 22.5 million tonnes, compared with 25.2 million in the previous year and the record of 25.9 million harvested in 1981-82. The 10% decrease was attributed to a sharp fall in acreage in North America and unfavorable weather conditions.

For North America, this year's crop was estimated at 4.7 million tonnes, including 2.7 million in Canada and 2 million in the U.S., contrasted with 7.1 million in the prior year, made up of 3.1 million in Canada and 4 million for the U.S.

Western Europe's outturn totaled 4.1 million tonnes, down from 4.5 million in each of the two prior years and 5 million in 1980.

Near East Asia accounted for 8.1 million tonnes, down slightly from 8.1 million in 1982-83, while North Africa's harvest totaled 2.5 million tonnes, compared with 2.9 million in 1982-83 and 2.2 million in 1981-82.

South America's harvest was projected at 0.2 million tonnes, the same as in recent years.

Durum production in other nations was placed at 3 million tonnes, against 2.5 million in the preceding season and 3 million also in 1981-82.

EDB Banned — Millers Must Find Alternative

On September 30, 1983 the Environmental Protection Agency (EPA) issued an emergency suspension of the use of Ethylene Dibromide (EDB) as a soil fumigant for crops. EDB is used by some millers in the milling industry to meet Good Manufacturing Practices and comply with government sanitation regulations. The ban, which is an emergency power, rarely used by EPA, immediately halts the sale and distribution of EDB for soil fumigation. EPA's primary concern is that this substance, which has been shown, among other things, to cause cancer, is seeping into drinking water supplies.

EPA also issued a "Cancellation Order" to cover fumigation of stored grain and spot fumigation of grain and flour milling machinery to prevent and remove insect infestation. The cancellation

order will be considerably reduced after last year's record shipments of 2.8 million tonnes and the smaller

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EDB Banned

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lution does not take effect for 30 days. If a manufacturer appeals the order, the order is further delayed and the product can be sold pending an administrative hearing.

Consumer reaction based on the extensive (and sometimes sensational) media coverage, at least on the east coast, is unknown at this time. The fruit and vegetable industry will probably be hardest hit, but the wheat using industry has been implicated. A Washington TV station reported recently that EDB residues were found in breakfast cereal, white bread, baby food, beef, and milk.

Robert Brady, a Partner at Collier, Shannon, Rill & Scott and former FDA official, stated: "In the normal instance, if the EPA bans a pesticide chemical, EPA and FDA set an action level which defines the residue level in food at which FDA will take regulatory action. This action by FDA recognizes that such pesticides are ubiquitous in the environment and cannot be avoided totally even with adherence to good manufacturing practices. Obviously, any intentional use of EDB after it is banned is illegal."

New Manual

A new "Manuale del Capo Pastaio"—Manual on Pasta Manufacture—has been written by P. I. Luciano Lirici and published by Chiriotti Editori, Pinerolo, Italy, in Italian.

The four parts cover fabrication, analysis of ingredients and finished goods, legislation (with comments on the U.S. Food & Drug Administration), and history.

The book is profusely illustrated.

Outlook for Eggs

From the U.S. Department of Agriculture

During the first half of 1983, egg producers were in a cost-price squeeze, as feed costs increased more than the price of eggs. The hot weather late in the third quarter limited output of large eggs so prices advanced, likely more than the per unit cost of production. As a result, estimated returns may be above costs but many producers still face financial problems. Producers have cut costs by buying fewer replacement pullets and keeping their old hens in the flock longer. One indication of this is the percentage of birds force molted. On September 1, 23 percent of the hens had been molted, up from 20.5 percent last year.

During June-August, 1983 egg production totaled 1,394 million dozen, down 3 percent from last year. The number of layers was down 5 percent but the rate of lay was up 2 percent.

During fourth-quarter 1983, egg production is expected to be down only 1 to 3 percent from last year's 1,479 million dozen. While the number of replacement pullets hatched that should be entering the laying flock in the fourth quarter will be down 13 percent from 1982, producers have kept their old hens in production.

Egg prices strengthened in the third quarter as supplies declined. The price for Grade A large eggs delivered store door in New York averaged about 75 cents per dozen during the third quarter, up from 66 cents last year. In hot weather, hens tend to lay smaller eggs, thus large eggs may be in shorter supply and higher priced. Egg prices usually increase seasonally in the fourth quarter and are expected to average 74 to 78 cents per dozen, up from 68 cents last year. Plentiful supplies of other high-protein foods are expected to moderate egg price gains.

For Dry Pasta Consumer Spending

from Supermarketing, September 1983

Value of Total Dry Pasta Consumption			
1982	Macaroni	\$369,690,000	
	Spaghetti	471,530,000	
	Noodles	271,750,000	
	Total	\$1,112,970,000	
1981	Macaroni	\$351,500,000	
	Spaghetti	447,750,000	
	Noodles	260,550,000	
	Total	\$1,059,800,000	
1982		% of Food Sales	% of Total Store Sales
Macaroni	.15	.11	71
Spaghetti	.22	.16	80
Noodles	.11	.09	72

'82 Supermarket Sales and Profits at Record Levels

The annual report card for supermarkets compiled by Food Marketing Institute reported that total supermarket sales had increased 5.3% between 1981 and 1982, to \$180.7 billion. After this amount was "deflated" by the food component of the Consumer Price Index, FMI said, total sales reached \$64.7 billion, up 1.7% from 1981.

The supermarket industry's total net income and sales spurred ahead strongly last year and the ratio of net to sales topped 1%. Net income reached nearly \$2 billion, showing a "real" gain after adjustment for the first time since 1978.

The FMI report stated that 1982's profit margin was its best in 10 years.

Inflation and Food Prices Up

Economist Michael Evans, President of Evans Economics and previously President of Chase Econometric Associates, made the following predictions at a meeting of the Food Group in Washington:

- interest rates will remain flat for the next 12 months
- food prices in 1984 will increase by 8 to 10%
- the 1983 \$90 billion trade deficit will worsen because of continued high exchange rates for the dollar
- 1984 inflation will be 6%
- 1985 inflation will be 7% and 1986 between 8 and 9%

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