

**THE
MACARONI
JOURNAL**

**Volume 66
No. 6**

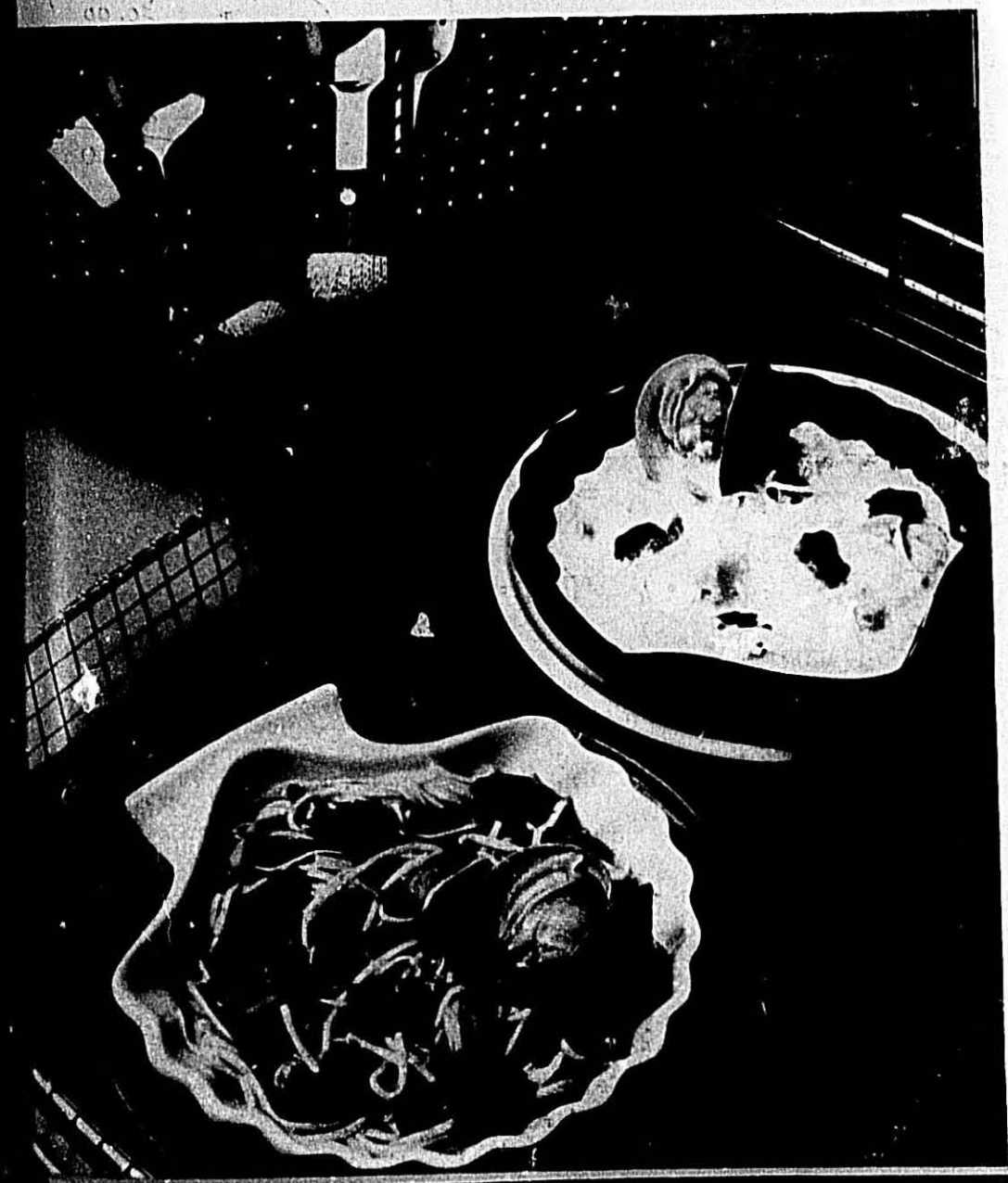
October, 1984

Macaroni Journal

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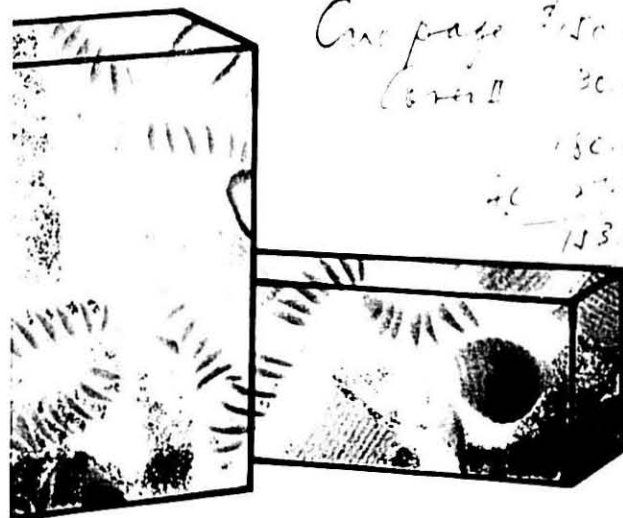
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The

Macaroni Journal

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October, 1984

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NATIONAL PASTA WEEK October 4-13, 1984

Releases for National Pasta Week will tie in with the 1984-85 theme "Pasta - A New Day, A New Way." Consumer-oriented materials will also be geared to American cuisine. Here's the rundown:

Major Market Newspapers

Transparency to color using newspapers. Featured recipes - Boston Clam Chowder with Pasta, Manhattan Clam Chowder with Noodles. Black and white version to be distributed to non-color using publications in 265 major market areas.

Syndicated Sunday Supplements Family Weekly

Syndicates
 Newspaper Enterprise Association, King Features, Amalgamated Publish-

ers, Economist Newspapers, Life Newspapers, Enterprise Journal, Paddock Publications, Westchester, Rockland Newspapers, Afro-American Newspapers.

Magazines

Good Housekeeping Parents, Woman's World, True Story

Television

Three-part Newsclip Series will be distributed to 100 stations in top 200 markets.

Cable TV segment distributed to 300 stations.

Radio

Two newscasts to 2,100 stations via AP/EPL audio network.

Supermarket Consumer Specialists

Two hundred thousand leaflets to chains and independents nationally.

Recipes for Cover Story

**Boston Clam Chowder
With Pasta**
(Makes 6 servings)

- 8 ounces fine egg noodles (about 4 cups)
- 1 tablespoon salt, optional
- 3 quarts boiling water
- 2 slices bacon, diced
- 1/2 cup chopped onion
- 1 cup chopped fresh clams or 2 cans (6 1/2 ounces) chopped clams, drained and liquid reserved
- Bottled clam juice
- 2 teaspoons butter or margarine
- 1 3/4 cups skim milk
- Dash ground pepper

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

While noodles are cooking, in large saucepan over low heat, cook bacon until almost crisp. Add onion and cook, stirring frequently, about 5 minutes. Measure drained liquid from clams. Add bottled clam juice to make 1 1/2 cups. Add to onion mixture along with butter. Cover and simmer about 10 minutes. Add milk, clams and pepper. Simmer 5 minutes longer. Add noodles and stir until well mixed and heated through. Calories per serving: 235.

Note: Chop fresh clams to equal 1 cup. Use clam liquid plus enough bottled clam juice to make 1 1/2 cups.

**Manhattan Clam Chowder
With Noodles**
(Makes 6 servings)

- 8 ounces fine egg noodles (about 4 cups)
- 1 tablespoon salt, optional
- 3 quarts boiling water
- 2 slices bacon, diced
- 1 medium onion, sliced
- 5 large tomatoes (1 1/2 pounds) chopped (4 cups)
- 1/2 cup diced carrots
- 1/2 cup diced celery
- 2 tablespoons chopped parsley
- 2 cans (6 1/2 ounces each) chopped clams, drained and liquid reserved*
- 1/2 teaspoon thyme leaves, crushed

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

While noodles are cooking, in large saucepan over low heat, cook bacon until almost crisp. Add onion and cook, stirring frequently, about 5 minutes. Add tomatoes, carrots, celery and parsley. Measure drained liquid from clams. Add bottled clam juice to make 1 1/2 cups. Add to vegetables along with thyme. Cover and cook over medium heat 15 minutes. Add clams and noodles; heat through.

* If using fresh clams, chop enough to make 1 cup. Use clam liquid plus enough bottled clam juice to make 1 1/2 cups.

**NPA Product Promotion
Report . . . 815 Million
Impressions!**

"For the first nine months of fiscal year 1984, the National Pasta Association's public relations campaign once again reached millions of Americans with the messages: Pasta is NOT fattening and Pasta IS a low-calorie, nutritious versatile, economical, convenient and delicious food for everyone," reports Robert Ronzoni, President of Ronzoni Macaroni Company and new chairman of the NPA Product Promotion Council which oversees the efforts of the NPA's nationwide pasta promotion effort conducted by Burson-Marsteller Public Relations.

Even though this year's program is not yet complete, results have already met or exceeded target goals. The program achieved 7,343 placements, resulting in over 815 million impressions.

Program highlights include the highly successful promotion of *The Pasta Lover's Diet Book* by Jane Robb. Through this vehicle, the low-calorie pasta story was featured on national television shows such as *Today*, *Breakway*, and *The Joe Franklin Show*; on 16 additional television shows in major U.S. cities, on three nationally syndicated and 25 local radio programs and in 17 food editor newspaper interviews in U.S. cities. And much more is coming, with stories scheduled by major newspaper syndicates and *Sunday Supplements*, Ronzoni said.

But the book promotion is only part of the results. The News Bureau and ongoing electronic media effort generated placements in leading women's magazines such as *Seventeen*, *Family Circle* and *Women's Day*; in major newspaper syndicated services such as AP and NEA; on the nationally-syndicated television show, *Better Way*; and in cooperative efforts with other food associations. The following table summarizes the public relations partial (9 months) results for the 1984 fiscal year.

Fourth Quarter Activities

Leaflet: 200,000 copies to be distributed in supermarkets and to extension home economists.

Video news releases: A three-part video news series on pasta to be distributed to 100 TV news stations.

Pasta Lover's Diet Book, Cable Television: Stories to come on newspapers, national newspaper syndicates. Magazine format to be distributed by satellite to 3,400 cable TC station systems covering 40% of the U.S. TV households.

(Continued on page 1)

	PLACEMENTS		IMPRESSIONS	
	Achieved	(Goal)	Achieved	(Goal)
Consumer News Bureau				
Magazines	80	(90-100)	252,419,291	(200-250,000,000)
Newspapers	207	(210-235)	438,970,503	(475-530,000,000)
Electronic Media				
Network TV	4	(2-4)	13,283,000	(-)
Radio Newsclips	6,720	(8,400)	96,000,000	(120,000,000)
Women's Interest Radio	288	(500-600)	3,247,000	(7-8,000,000)
Important Extras (beyond goals)				
Local TV	16		1,433,000	
National Radio	3		4,142,191	
Local Radio	25		6,182,500	
Total	7,343		815,667,485	

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Elinor Ehrman

PRODUCT PROMOTION REPORT

by Elinor Ehrman and David Canty of Burston-Marsteller at the NPA Summer Convention

throughout Canada. She was also interviewed by the *Toronto Globe and Mail*.

The book is presently in its fourth printing, and has passed the 15,000 mark. In book publishing circles, a successful book is one which reaches a distribution of 10,000. Remember the significance of this promotion is not the number of books sold, but the millions of people reached with the pasta message.

Here's a quick review of our results so far on the diet book. We first discussed this book with June Roth, well known author of 32 books on health and nutrition, over two years ago. We worked with her on copylines, and she was able to weave in our industry copy points into the basic concept. Our message "Pasta Is Not Fattening" coincided with her sincere belief that pasta is a nutritious food that can be served at lunch and dinner for less than 1,000 calories per day, every day for two weeks and lose weight.

We met with Bobbs-Merrill editors and publicists, and worked out a promotional program for the book. The publisher even accepted our edits on copy for the spring catalog.

Our photography was used on the cover of the book. The "Book World" first read about it in *Publishers Weekly* which described it as "more of a cookbook than a diet book." They promoted her premise that pasta in 5-ounce portions topped with low-calorie sauces and served with a vegetable and salad makes for delicious diet fare.

In January, 1984 *Family Circle* devoted a 2-page spread to "Tempting Lo-Cal Pasta Dishes," and credited the book and its author.

Another fine tribute to the book appeared in the spring edition of *Country Decorating Ideas*.

Last month the nationally circulated *Star* devoted their food feature to the book. "If you love pasta but think you can't afford the calories, try these three delicious recipes that will let you indulge your passion for pasta without paying the consequences in unwanted pounds. Pasta is for those who want to be thin, says June Roth, author of the

Pasta Lover's Diet Book." Circ. 3,905,400.

And in her own syndicated health column, June discusses the merits of pasta and its low-calorie versatility. Her columns appear weekly in 40 major newspapers around the country.

I know that just about everyone of you met June Roth when she was our guest at the winter convention. We had given her a crash course in TV presentations, including our NPA copy points to stress, and she was an excellent student. We admonished her about her personal weight problem, and she obligingly went on her own diet and was able to tell TV and radio audiences of her 15-pound weight loss as a result.

Orlando was her first tour city which was followed by Tampa/St. Petersburg, Dallas/Fort Worth, Houston, San Francisco, Detroit, Cleveland, Baltimore, Atlanta and Miami... and New York City.

Here are some of the stories which ran in the cities as a result of personal interviews. All with the low-calorie message - Orlando, Newark, Houston, etc.

The headlines state: "Boo! lets you enjoy and reduce"

"Pasta diet? Better believe it"

"Writer comes to praise pasta—not to bury it in fatty sauces". We prepared special releases for the markets where June was not to appear. And here are some results in Lincoln, Nebraska, City, Grand Forks, Syracuse, and Lancaster

A re-cap of print interview includes these major papers, and the syndicated *Family Weekly*, *EA* and *New York Daily News*.

Here is a re-cap of her television appearances, including three network and nationally syndicated shows of NBC's *Today Show*, *The Joe Franklin Show* and *Breakaway* - filmed in Hollywood.

Again in the electronic era — some radio spots, headlined by three network breaks including ABC and CBS.

Here's David Canty, to run you through excerpts of some of these spots on both television and radio.

(Continued on page 8)

THE MACARONI JOURNAL

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Is there a connection between airlines and pasta production lines?

There certainly is!

BRAIBANTI has a staff of more than

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technicians, installers and supervisors always available to assist its customers.

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120 qualified technicians always on the move, always available to serve the customers, always ready to supplement and assist the local managers and BRAIBANTI sales staff.

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OCTOBER, 1984

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Good morning!

At the Florida meeting in March we gave you the highlights our promotional campaign since the adoption of the NPA strategic plan at La Costa three years ago.

This morning, we're presenting a stewardship report of our nine months results in the current fiscal year, beginning October 1, 1983.

We're including our promotional goals for the year, with our results to date as a benchmark of our progress in reaching them.

Our target audience continues to be:

- Women in 18-49 age group
- Low and middle-income families and our promotional message—
- Your family can eat pasta every day because it is low in calories
- Pasta is not fattening

As our major promotional vehicle to get this message across, we chose to promote a book which spelled out our message and focused on June Roth's "The Pasta Lover's Diet Book."

We made every effort to make it a best seller in its category.

The promotion is still going on. In fact, June is in Philadelphia today making TV and radio appearances—sponsored by Bobbs-Merrill, her publisher.

She is also just beginning a series of telephone interviews with radio commentators across the country, and has completed spots in Providence, Boston and Cleveland to date. This series will continue throughout the summer.

As our Canadian members know, she went to Toronto in June, where Burson-Marsteller Toronto placed her on network radio and television shows

Product Promotion Report

(Continued from page 6)

David Canty

Thank you, Elinor.

We've been involved in many spokesperson media tours in the past, and this one was without a doubt one of the most successful. For example, the typical "guest" on a talk show is usually on for 4 to 5 minutes. But June cooked, demonstrated and talked about pasta for usually 7-8 minutes in her appearances. We've looked through the 3 national and 16 local TV shows June was on, and put a few segments together in a 10 minute tape.

June did an excellent job getting our low calorie message through loud and clear.

During her national tour, June also did 25 local and 3 nationally syndicated radio interviews.

To date, our pasta lover's diet book promotion has carried our pasta message to millions of Americans and generated nearly 34 million impressions and more is coming with stories scheduled by major newspaper syndicates and Sunday supplements, but the book promotion is only a part of our program for 1983-84, and a part of the budget. We continue our on-going activities in print media with story and recipe placements in newspapers and magazines, and we continue many radio and TV placement activities — again, all in addition to the book promotion.

The results of those activities? Even though we are only nine months into the program, we are on target or in some cases already exceed the goal for the year.

In our news bureau, for example, we send pasta recipes and story ideas to the top 265 major market area papers. Our goal is 125-135 black-and-white and color placements in the top 100 papers of those 265 major market areas. We don't track placements in the 101st through 265th size papers because that would result in some many clips our monitoring costs would sky rocket.

Already to have gone beyond our goal — we've gotten 139 placements for a circulation total of over 25 million.

We introduced our new theme for the year at our annual press event in New York. Our site for the editor reception was the American Stanhope which had hired Jack Terczak, a chef who is a

pioneer in the evolution of the new American cuisine. We chose the theme "Pasta Goes American". We felt this would give pasta greater news value because it would link it with the growing interest of food editors in regional American cooking. Recipe and story lines were developed around this theme for pick-up by the editors.

And pick up on it they did. The *Houston Post* states "Pasta goes American when teamed with fresh vegetables of the season and a savory sauce with Monterey Jack Cheese." And our low calorie message comes through as the story continues "For lean cuisine, try spaghetti topped with a medley of Broccoli, mushrooms, squash and tomatoes. Calorie count is 370".

Here are two more of the 139 placements, with the *Oklahoman* stating "The myth that pasta is laden with calories has finally been dispelled."

When spices or vegetables are combined with pasta, the calories are minimal. In fact, the national pasta association says there are only 210 calories in a five-ounce cooked portion of pasta." And the headlines on the left underscores our theme, stating "Pasta goes American in low-cal vegetable combos."

This year we made some of our color placements through a color mat service. One we cost-shared with the tea council. To date, it has appeared in 38 papers for a circulation total of nearly three million. It also appeared in papers in Sacramento, Indianapolis, Las Vegas, Long Beach, Chattanooga, and Knoxville, to name a few.

The *Sacramento Union* ran this story reminding its readers that October 6-15 is Pasta Week, and "there's no reason to hold back when you remember there are only 210 calories in a 5-ounce cooked portion."

More examples . . . stories in the *La Herald Examiner* on macaroni and cheese. In the *NY Times* - "Pasta dishes inexpensive, nutritious and quickly prepared" and in the *San Francisco Examiner* - "Pasta from appetizers to desserts."

Here's a collection of placements. Our low calorie message made the headlines:

- Low-Calorie pasta dish has cheese, vegetables
- Waistline watchers like pasta
- Tasty noodle casseroles are low in calories

- Pasta makes low-calorie vegetable combo filling
- Noodles nice, not naughty
- Pasta association offers ideas for salad

Our news bureau also places stories in newspapers not covered by our efforts in major markets, through newspaper syndicates like AP and UPI, in syndicated Sunday supplements like *Family Weekly* and *Parade*, and in national newspapers like *The Star* and *USA Today*. Our goal is 85-100 placements to reach a potential circulation total of 450-500 million. So far we're on target at 9 months into the year with 51 placements and over 409 million circulation total. Here are a few examples of those 51 placements.

Newspaper Enterprise Association has a potential circulation of 25 million. It ran our recipe for cold pasta salads with vegetables, and picked up our theme in the title "Food for Americans."

NEA also ran a pasta story on the most American of all days - Thanksgiving, and notice the low calorie message again: "Often we think of pasta dishes as fattening. Five ounces of enriched pasta is a low 210 calories."

Our message came through here in *Grit*. "contrary to food myths, pasta is not fattening, and in the story 'Many people believe that pasta is loaded with calories, but the fact is your family can enjoy pasta everyday and not have to worry about calories. and the *Star* says 'tasty dishes that make pasta a dieter's delight . . . National Pasta Week, October 6-15, is a good time to take another look at this versatile food staple that still has an undeserved bad reputation among some diet-conscious people. Calorie counters needn't count pasta out or their eating enjoyment - not if they realize there are only 210 calories in a satisfying five oz. portion of cooked pasta."

Magazines are our other major news bureau activity, and we set a goal of 90-100 placements for a 200-250 million audience reach. At 9 months we're on target with 77 placements and have already met our circulation goal. Here are a few examples.

Family Circle ran a story by Jane Brody called "Eat Heartily and still lose weight." The story continues: "You can drop pounds on a diet high in carbohydrates. Starchy foods are lower in calories because they contain

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OCTOBER, 1984

Product Promotion Report

(Continued from page 8)

much less fat and fat supplies more calories than any other nutrient. A spaghetti dinner has fewer calories than just the meat in a steak dinner or a quarter-pound hamburger on a bun."

Family Circle also recently ran this story about Nika Hazelton's forthcoming book, for which we supplied her materials.

And Woman's Day ran a story on spaghetti primavera on the cover and noted it had only 337 calories. The article was on "diet dinners."

Again our American theme shows it's news value for pasta here in a Woman's Day Super Special titled, "Great American Cooking. Pasta Goes American." And in the story it says, "pasta in itself is low in calories - only 210 in a five-ounce cooked portion. It's the go-wits that can be the culprits" and a pasta story in Harper's Bazaar is anything but bizarre, stating that "carbohydrates in pasta burn more slowly, giving you lasting energy, and at only 200 delicious calories per cup, it's a dieter's dream food."

Young people are an important market; 30% of today's food dollars are spent by teenage girls, and here in Seventeen, they learn "The Lowdown on Pasta." The story says - "We want to clear up pasta's reputation as a delicious but diet-destroying food - it's what you pile on top of it that can raise the calorie count astronomically."

And just a few more examples. The cover of Women's World showed "diet recipes that take the points out of pasta." The diet and nutrition section was titled - "pounds off with pasta," and featured light recipes calories counted at 360 or lower.

Attenzione called attention to pasta right on the cover - "The power of pasta-tive thinking." The five-page story that followed featured three NPA photos. It described "pasta Pluses - oodles of noodles also contain B vitamins, riboflavin, niacin and iron and are contrary to popular belief - low in calories. An average serving (five ounces) has only 210-220 calories. The inside story titled - "A Food for all Reason" stated "known collectively and lovingly as pasta, these golden delectables come in a multitude of shapes and sizes, adapt to any sauce, delight dieters, satisfy athletes and make all around winning meals."

Electronic Media

Moving into electronic media activities, we are shooting for 2-4 placements this year, and have already achieved 4 for over 13 million audience impressions. Three of the four were June Roth's, one was with one of our friends at USDA, Edith Hogan.

Radio is second only to television in share-of-time, and we also conduct a number of radio activities - womens interest features, radio satellite news feeds, and spokesperson placements. Collectively we try to achieve 127 million impressions, and are on target at nine months with over 104 million. Our radio news features are short, usually about 60-90 seconds. They tie pasta with some topical news item, and are beamed by satellite to 2,100 radio stations in the AP/UPI network.

And since we are at the 9 month mark, we have a number of activities yet to come. We will be producing a new TV news series for distribution this fall to 100 of the top 200 TV news stations, our goal is usage by 40-50 of them.

The footage from the series can have extended and therefore cost effective uses. For example, with it we will produce a new 30 minute cable TV segment for distribution to 300 cable stations via satellite.

And still to come this year is our new leaflet to be distributed to editors, and home economists, and to food shoppers through our mailings to supermarket consumer specialists.

And we're looking forward to our annual press reception in New York in Mid-September. There we will launch our theme for 1984-85: "Pasta: A New Way Everyday."

To summarize our results for the first nine months of this fiscal year, we have achieved 7,343 placements for over 815 million impressions. With our year's budget that comes to only 32¢ per thousand.

Conagra's 1984 Pasta Program

Last year, to help counter the growing threat of imported pasta, ConAgra originated a pro-American pasta campaign. Sent kits about "World's Best Pasta - Made In USA" to 500 newspapers.

Many of the editors - especially food editors - shared the opinion that

it was time for some flag waving. There were a hefty number of stories and recipes printed.

Advertising

This year, ConAgra will again aggressively promote American pasta with a campaign that can pay cash dividends.

Over the next three months supermarket executives will be seeing ads promoting pasta's profitability and growth. They will run in Progressive Grocer and Supermarket News - over 370,000 copies.

Progressive Grocer: September, October and November.

Supermarket News (September 10, October 15) and (November 12).

Plus Letter

In addition to this, the 200 top supermarket executives will receive advance notice of the program along with reprints of the ads via direct prior to the campaign breaking.

C. Robert Stephenson, ConAgra Vice President and General Sales Manager, has written personalized letters as follows:

Dear Sir:

Nothing beats an idea whose time has come. Especially when it means more sales.

The idea is simple: increase pasta sales by welcoming the many Americans who are rediscovering pasta. Through a combination of professional reports and mass media stories, your customers are learning, to their delight, that pasta is now an "in" food.

They're being told why pasta's carbohydrates don't trigger calorie storage; that pasta contributes to good health and that pasta is socially acceptable in dozens of new recipes.

So, people are buying more pasta. Enough so that, in recent years, the growth of dry pasta has been about triple that of all supermarket dry grocery products as a group. Enough so that pasta sales are expected to grow, in real dollars, 4.8% a year through 1990!

The pasta bandwagon is still gaining speed and there's still plenty of room for your stores.

We're reminding the grocery industry in ads - and you personally - what a profit potential pasta has. It's already giving you a better margin (25.8%) than many other items in your stores.

(Continued on page 14)

THE MACARONI JOURNAL



**PASTA SALES
GROWING 3 TIMES
AS FAST AS ALL
OTHER DRY
GROCERIES.**

PROFIT FROM PASTA'S NEW POPULARITY!

It's a fact. Over the past seven years, the growth of dry pasta has been about triple that of all supermarket dry grocery products as a group.

Your computer will tell you pasta is giving you a better margin-turnover combination than many other dependable money-makers in your stores. Average margin: 25.8%, plus impressive turnover.

Pasta is expected to have 4.8% real annual dollar growth between now and 1990.

New facings now mean more money now. Because new sales are coming from people who now know pasta is good for them. Others have learned pasta's carbohydrates don't trigger calorie storage as much as many other foods. Still other new customers are showcasing pasta in delicious new recipes.

There's still room on the pasta bandwagon for you.

ConAgra Flour Milling Company



FOUR THINGS YOUR COMPUTER WON'T TELL YOU ABOUT PASTA:

1. Pasta is now a good-health food.
2. Pasta is now a diet food.
3. Pasta is now a gourmet food.
4. Pasta sales are expected to grow 4.8% a year through 1990.

Your computer will tell you pasta is already giving you a better margin turnover combination than many other dependable moneymakers in your store.

Average: 25.8% margin, plus impressive turnover.

Over the past seven years, the sales growth of dry pasta has been about triple that of all

supermarket dry grocery products as a group.

Pasta is hot because pasta has some new, well-publicized images. It's good for people of all ages, doesn't trigger calorie storage as much as many other foods and is being served in delicious and unconventional new ways.

Give pasta room to grow.

There's still plenty of room on the pasta bandwagon. Pasta's new popularity means new profit potential for retailers who push pasta now!

PASTA, THE CONSUMER AND THE CHANGING AMERICAN DIET

by Janet Johansen, Consumer Panel Manager,
Better Homes and Gardens, at the NPA Summer Convention

Today, I would like to discuss consumer attitudes towards pasta, based on the results of a survey of the Better Homes and Gardens Consumer Panel. The questions in the survey were submitted by the National Pasta Association, and Burson Marsteller and, in turn, were mailed in April, 1984, to the 500 members of Panel B of the Consumer Panel. The Better Homes and Gardens Consumer Panel was established in 1976 to provide effective, informative communication between business and consumers. The Panel investigates consumer trends and preferences through its one thousand members, who are divided into two groups of five hundred. Each Panel is demographically matched to BH&G's 7,450,000 subscribers so we can reliably project results from Panel studies of the total BH&G subscriber base.

Current Trends

Before I discuss the results of the survey — and be assured that there is good news to report — it is important to place such a survey within the context of several trends of direct importance to you as food marketers.

First, the last few years have seen a dramatic change in consumers' attitude toward nutrition and health. A recent Consumer Panel study on eating habits revealed widespread concern with health and nutrition. Maintaining the right weight, eating a balanced diet, getting enough exercise and staying away from salt were the most frequently listed health concerns of subscribers.

Second, we have seen a resurgence in home entertaining. During past periods of high inflation, many Americans turned to dining at home as an alternative to eating in restaurants. Subsequently, we have seen increased interest in gourmet and fresh foods, as cooking as a hobby for both men and women has grown in popularity. Food as an expression of creativity or status is very much a part of contemporary middle class American life.

Third, and this is the most important factor, half of the adult women in America are employed. The

social and economic ramifications of this fact are numerous. For our purposes, I'll mention only a few. There are now more two-income families and they have generally greater disposable income than families with a single wage-earner.

They can afford top quality gourmet and specialty foods. Yet at the same time, the demands of work have left the two-income family with less time to shop and cook. Not surprisingly, the rise in two-income families has spawned greater demand for convenience foods.

Perhaps there seems to be a contradiction here. A minute ago I said that consumers were more interested than ever in fresh foods. For example, according to the United Fresh Fruit and Produce Association, supermarket produce sections have, on average, doubled their square footage in the past five years — more growth than any other section of the store. But now I'm saying that consumers are buying more convenience foods. In fact, both statements are true, and this leads to my next observation, which is of central importance to food marketers such as yourselves. There are few, if any, consumers with monolithic food needs. We are living in an age that is seeing the decline of mass media and the mass market.

The same consumer who feeds his or her family with frozen lasagna cooked in the microwave on a busy Tuesday may spend all Saturday afternoon buying fresh vegetables and premium pasta for a leisurely dinner of pasta primavera. Consequently, food marketers must adapt to the various food needs these families have at different times in the week.

Why Care?

Why should the National Pasta Association care about these factors? I would suggest that these trends — rise in nutrition awareness, increased interest in fresh foods and home cooking, as well as the increased number of women in the workforce and the changing food needs of these families — are all conducive to a healthy sales climate for the pasta industry. The reasons, I'm sure, are

clear to all of us. Pasta is nutritious, low in calories; it contains fiber, is a complex carbohydrate and is a good source of protein. The various pasta shapes can be used for the simplest or most elegant occasions. Pasta dishes can be cooked in a matter of minutes, served hot or cold — pasta is convenient and versatile for the busiest of families. Finally, in terms of price, pasta is still a bargain. Clearly pasta has all the attributes to make it a staple of contemporary American cooking.

Survey

Let's turn now to the Better Homes and Gardens Consumer Panel survey on pasta for the National Pasta Association to see how pasta fits the lifestyle and eating habits of these respondents. There is good news. Pasta is popular. Over 92% of respondents eat pasta, and 11.3% eat pasta two or more times per week. More than 46% eat pasta at least once a week.

The study also shows that pasta is most popular among respondents from the Northeast states, followed by those in the Western, North Central and Southern states. The comparatively high concentration of persons of Italian ancestry in the Northeast — particularly in the metropolitan areas of Boston, Providence, Philadelphia and New York — must account in some measure for the regional skew of pasta consumption.

When asked what type of pasta they eat or serve most often, 55% of respondents say spaghetti. Macaroni is second, named by nearly 27% followed by egg noodles, lasagna, and other pasta types.

Let's turn to some of the highlights or responses given to questions about various characteristics of pasta types. In each instance, respondents were asked to rate each pasta type in terms of a single criterion, such as "good tasting". If they very much agreed that spaghetti with meat sauce was good tasting, they circled the number four; if they somewhat agreed, they circled the number three and so on. From all these responses

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Consumer Survey

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We have calculated mean, or average, scores which range from one to four and reflect the overall attitude of respondents.

And, overall, attitudes towards pasta are very positive. For each category of pasta surveyed, respondents show strong agreement with the statements that the various pasta types are "filling", "convenient" and "taste good". In light of the multiple food needs of today's consumer, this overall response suggests that respondents are aware of and appreciate pasta's many advantages.

More specifically, let's examine the response to each pasta category included in the survey. We'll be looking at the four highest and the two lowest scores in each instance.

For dry spaghetti, "filling", "convenient", "good tasting" and "liked by children" receive the highest scores.

"Little food value" and "good source of fiber" receive the lowest scores. Interestingly enough, these two criteria received the lowest scores for each type of pasta in the survey. Respondents know that pasta has substantial food value, but they seem to be unaware of any fiber content.

For macaroni, "filling", "convenient", "versatile" and "liked by children" lead the list of characteristics with which respondents most strongly agree.

"Little food value" and "good source of fiber" elicited the strongest disagreement.

Attitudes towards egg noodles repeat the patterns we've seen, except this time "convenience" heads the list. Nonetheless, respondents repeat their three main opinions of pasta: it is filling, tastes good and is convenient.

Again, "little food value" and "good source of fiber" receive strongest disagreement.

"Filling" and "good taste" receive top marks in the fresh pasta category, followed by "high in starch" and "liked especially by adults."

"Little food value" and "good source of fiber" once more receive the lowest marks.

For spaghetti with meat sauce, we see the same three qualities — filling, good tasting and convenient — from respondents. Indeed, these mean receiving the strongest agreement

scores are very high. Practically 75% of respondents "very much agree" that spaghetti and meat sauce is filling, and over 67% "very much agree" that it is good tasting.

"Little food value" and "good source of fiber" elicit the least amount of agreement.

Macaroni and cheese receives a high rating for the three common qualities we've discussed, but also draws strong respondent agreement on its starch and caloric content.

And, no surprises here, "Little food value" and "good source of fiber" bring up the rear.

Tuna noodle casserole is the only category in which "good tasting" or "liked especially by adults or children" does not show up in the top four mean scores. This category is also the only one in which nutritious and good value for the money made the top of the list.

As usual, "little food value" and "good source of fiber" elicit the least agreement among subscribers.

The Calories Issue

I would now like to discuss the pasta and calories issue. In the battle of the bulge being waged across Middle America's midriffs, you as pasta marketers have had to work hard to educate the consumer about your products' low caloric content. The results of the survey indicate you've won a partial victory in your campaign. The majority of respondents are aware of pasta's low caloric content, but there does seem to be some confusion about what low caloric content means in terms of other nutritional factors such as carbohydrates.

For instance, when asked to estimate the caloric content of five ounces of cooked pasta with tomato sauce, 62% of respondents answer under 300 calories. (The actual figure is somewhere between 280 and 290 calories.) Twenty-two percent estimated between 300 and 349 calories, and thirteen percent guess a figure of over 350 calories. Thus, the good majority of respondents are aware of pasta's relatively low caloric content.

Let's explore this issue further by examining respondents' answers to the various criteria. For "High in calories," respondents to the survey show they are aware that pasta dishes are fattening only if the sauce is fattening. Thus, macaroni and cheese and

spaghetti with meat sauce receive the highest mean scores. It is not clear why respondents give fresh pasta a higher rating than dry spaghetti and macaroni. Perhaps it is the texture of fresh pasta that creates the perception that it is more fattening than dry products. As you can see, dry spaghetti and macaroni receive lower ratings than pasta with sauce.

When given the criterion "fattening," respondents rate the pasta types in the same order as they did for "high in calories." The consistency of response in this instance suggests that these consumers are aware that pasta does not have to be fattening, and the low mean score of dry spaghetti is most encouraging.

Our survey also shows that these consumers know that pasta is a good source of carbohydrates. Each category receives a mean score greater than three. While the scores are all pretty close, it is interesting to note that once again macaroni and cheese and spaghetti with meat sauce head the list. It makes one wonder whether consumers assume that foods that are higher in calories are also higher in carbohydrates.

Furthermore, though respondents may not know that scientific details of complex carbohydrates, they are nonetheless aware that pasta is a good source of starch, which is an important complex carbohydrate. Again we find that though the mean scores are quite close, macaroni and cheese tops the list. This begs the question of whether richer, more fattening foods are associated with high starch content.

CONSUMERS AWARE OF STARCH CONTENT

High in Starch	Mean
Macaroni and cheese	3.57
Macaroni	3.48
Dry spaghetti	3.47
Fresh pasta	3.46
Spaghetti with meat sauce	3.33
Egg noodles	3.32
Tuna noodle casserole	3.17

Overall, consumers in the survey do not exhibit great knowledge of pasta's nutritional content, though they are aware, to a large extent, of its caloric content.

I am aware that the N.P.A.'s Nutrition and Education Committee has

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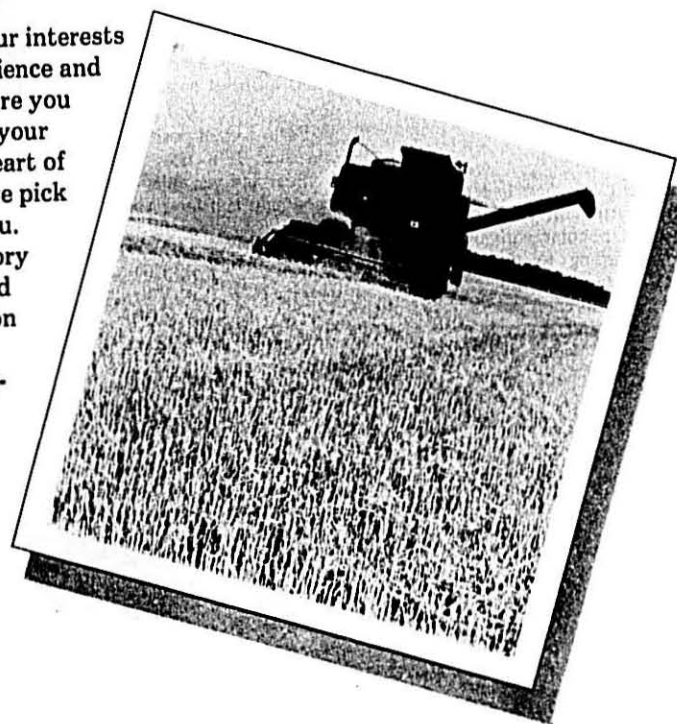
THE MACARONI JOURNAL

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OCTOBER, 1984

Consumer Survey

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worked hard on spreading the word about pasta as a source of fiber, vitamins, minerals and complex carbohydrates and would hope that these efforts continue, perhaps even in the form of direct consumer advertising.

The mean scores — roughly three for each category — for the criterion "nutritious" indicate that respondents somewhat agree that pasta is a healthful food, but elsewhere in the survey, when asked about pasta as a good source of vitamins and minerals, respondents, in general, give each pasta type a rating lower than three; that is, they show little agreement that pasta is a good source of vitamins and minerals.

The survey may suggest a lack of consumer awareness of pasta's nutritional content, but one thing it makes certain: these consumers believe pasta is filling. Each pasta type receives a high score in this category, which is important. In the marketing of pasta you can sell the product on its nutritional qualities as well as the fact that it satisfies one's appetite, unlike some so-called health foods such as bean sprouts or tofu.

Best of all, respondents say pasta taste good, though, they are less enthusiastic about tuna casserole than other varieties. Spaghetti with meat sauce scores highest in terms of taste.

Spaghetti with meat sauce is also the most popular with the adult palate, according to the mean scores. Fresh pasta is second.

For children, respondents give macaroni and cheese the highest overall rating, with spaghetti and meat sauce close behind. Tuna noodle casserole still languishes at the bottom in the land of leftovers.

Ability to Adapt

Pasta's ability to adapt to every occasion is very much appreciated by respondents. They believe that macaroni, dry spaghetti, egg noodles and fresh pasta are versatile foods that can be prepared in a number of ways. Whether these respondents actually know many ways to prepare pasta is an issue I will address a little later.

Tied to the notion of versatility is that of convenience. The high mean scores in this category show that these consumers appreciate the quick and easy preparation of many pasta dishes. The only exception is fresh pasta,

which receives a low score. Perhaps if it were more widely used, respondents' perception of its convenience would be greater.

PASTA'S CONVENIENCE COUNT PASTA'S CONVENIENCE COUNTS

Convenient	Mean
Macaroni	3.60
Dry spaghetti	3.60
Macaroni and cheese	3.52
Egg noodles	3.52
Spaghetti with meat sauce	3.50
Tuna noodle casserole	3.29
Fresh pasta	2.97

Respondents' positive attitude towards pasta extends to its excellent, economical value.

Each type of pasta scores high in this category, with macaroni and spaghetti products leading the way.

Respondents reiterate their belief that pasta makes an excellent meal with their strong disagreement with the statement that pasta has little food value.

Finally, you can be assured that there is consumer confidence in the products you market. Respondents show strong agreement that the various forms of pasta are products they trust.

Pasta is well-positioned in the marketplace. It is tasty and filling, convenient and versatile; it provides good economic and food value.

More Consumption?

Can we look to increased consumption of pasta in the future? Unfortunately, according to the survey, the answer seems to be no. Nearly 85% of respondents say they intend to eat about the same amount of pasta in the future as they do now. Over 5% say they intend to eat more; nearly 8% say less.

The survey also asked why respondents don't serve pasta more often. Nearly half say it is because pasta is high in calories and fattening — a somewhat contradictory statement compared to data we've already looked at. Nearly 30% say they don't know enough ways to serve it, and nearly 24% noted other reasons.

It is also interesting to note that 58% of those respondents from the Northeast — where pasta consumption is high — say they don't serve pasta more often because it's high in calories and fattening. Only 41% of

respondents from the West give calories as a reason for not serving pasta more often.

An important reason respondents are not serving pasta more often may be that they do not know enough ways to serve pasta, and that for the most part, their repertoires are limited to a few basic dishes with sauces that do tend to be fattening. More people are familiar with macaroni and cheese, for example, than with pasta with light vinaigrette dressing. By providing consumers with light, low-calorie alternatives to standard pasta dishes — by expanding their culinary sense of what pasta can do — you can increase your market. Which is not to say that that will be an easy task.

What is easy, is to look at respondents' usage of fresh pasta. Only 20% have purchased it; of these, nearly 70% say it is better than dry.

What of Imports?

And what of the imports? I can tell you that the position of domestic pasta manufacturers is strong in the eyes of the consumers surveyed. Only 22% have purchased imported pasta. The most common reason given by respondents for buying imports, however, is impulse, named by over 40% of those who purchased imported pasta. Quality and price are the next most commonly mentioned reasons for purchasing imported pasta.

Once they buy imported pasta, these respondents are hardly old on its benefits. More than 60% of respondents who have purchased imported pasta say they see no difference compared to domestic pasta: 30% do say they think it is better, and a small but distinguished minority whom I'm sure you'll all applaud say that imported pasta is worse than domestic.

Only 29 of the 422 respondents surveyed preferred imported pasta. The most commonly mentioned reasons for this small group's preference were overall quality, taste, firmness and texture.

That sums up the statistical results of Better Homes and Gardens' Consumer Panel survey for the National Pasta Association. I was asked to discuss how surveys such as this are incorporated into food editorial of Better Homes and Gardens magazine.

Let me spend just a few last minutes giving you some examples. After

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THE MACARONI JOURNAL

Pasta! Today's All-American word for fun. A powerhouse of nutrition in all shapes and sizes. High in energy-producing carbohydrates. Lower in calories than many popular weight-control foods. A reliable source of iron and hard-to-get B-complex vitamins. *Pasta!* Elegant enough for gourmet tastes. Light enough for America's new fitness generations. *Pasta!* Made best from Amber Mills Venezia No. 1 Semolina, Imperia Durum Granular or Crestal Fancy Durum Patent Flour. Make sure your pasta products are as fit as the crowds they feed. Shape 'em up with Amber's pasta performing ingredients.



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like fun.**

2% 2.83



Consumer Survey

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all these numbers and tables I'm sure you'll be pleased to know that there are only food pictures left to look at plus a few headlines. And if all you've been looking at is the food pictures, that's okay, too, since they all come from the pages of Better Homes and Gardens.

BH&G is evolutionary, not revolutionary; we change gradually with our readers, adapting to their changing lifestyles, introducing new ideas and techniques that educate readers with recipes and nutrition information.

Cover Story

And pasta is part of BH&G editorial. January, 1983, cover story was on pasta.

The articles contained 20 new pasta recipes, all illustrated with four-color photographs to show the varieties of shape and presentation possible with pasta.

"Pronto Pasta!" provided recipes that could be prepared quickly — a response to the time demands on busy husbands and wives.

This part of the pasta feature showed how versatile pasta is — that it can be served as a light appetizer or as a full meal.

Readers were given elegant, sophisticated recipes to use when they have the time and interest to prepare a special meal.

"Surprising Pasta," featured unexpected ways of preparing pasta and acquainted readers with some lesser-known varieties of the food.

The article also included this photo titled "Pasta Potpourri" which pictured and identified 22 different pasta types.

The article showed how pasta's various qualities could fit the various lifestyle needs of our readers for convenient, versatile, innovative and elegant food.

Our treatment of pasta is typical of Better Homes and Gardens approach to better eating. We do not publish any trendy diets. BH&G nutrition articles are factual pieces that promote good eating as a pleasurable social experience — there's no starving or suffering involved in eating healthfully and enjoyably.

For instance, in our February, 1983, issue, Better Homes and Gardens published a major story on 28

low-calorie recipes. Each recipe was illustrated in a four-color photograph. The recipes were easy to prepare, used everyday ingredients and were designed for enjoyment by the whole family. BH&G editors incorporated the consumer's needs for convenience and good taste to make the plan as practical and easy as possible. In every food feature, Better Homes and Gardens food editors address the nutritional needs and taste preferences of readers and seek to expand their culinary horizons with recipes that are compatible with their lifestyle.

Suggestions

I've discussed consumer attitudes towards pasta within the context of a changing American diet, which is a function of a changing society. We've seen that consumers have very positive opinions about your products. To maintain and develop this franchise of consumer confidence, I have several suggestions. Continue the current campaign which through various channels educates consumers about pasta's low calorie and high nutritional value. Provide recipe information at as many points in the distribution process as possible. Consumers are hungry for information. Give consumers more ways to prepare pasta, and you might just see a rise in sales. Stress the convenience and value of your product. In this busy world convenience is an essential factor in food purchasing. As always, consumers appreciate value for the money which pasta clearly offers. Value never goes out of style.

It was over five thousand years ago that the Chinese first recorded the eating of pasta, but it seems clear from the results of the Better Homes and Gardens Consumer Panel survey for the National Pasta Association that there is no food quite as contemporary in America as pasta — a food for the eighties.

ConAgra's Pasta Program

(Continued from page 4)

I urge you to read the enclosed ads. Then pass it on to the executive responsible for locating potential new profits. If that's you, your search may be over for this week.

There is *new* money to be made in additional *marketing* of pasta. ConAgra is committed to supporting America's pasta makers.

NPA Promotion

(Continued from page 4)

Radio: Two more radio news releases for additional 3.5-4.0 million audience reach.

NPA Annual Press Reception: September 19, 1984. Editors and media specialists invited.

* Audience impressions are based on actual circulation figures of Sunday Supplements and major dailies, and potential circulation figures of newspaper syndicates.

Product Promotion Committee members are Norman Anseman, National Food Products; Marti Yeager, The Creamette Company; Paul Vermyle, A. Zerega's Sons, Inc.; Donald Berman, Best Foods U.S.; Clifford Larsen, San Giorgio-Skinner Co.; Steven Brody, Coca-Cola Foods Division; James Petersen, The Pillsbury Company; with Robert Ronzoni, Ronzoni Macaroni Company, as Chairman.

Scott Towel Offer

Scott Paper Co. has announced a savings guarantee of at least 10 percent — or payment of up to \$1,000 in cash or products — to business, industrial and institutional customers who switch to the company's line of paper towels.

Quoting Mike Shackelford, director of marketing for the Washroom Group of Scott's Commercial Products Division, *Paper Sales* reported the offer applied equally to users of competitive paper toweling systems and those using cloth roll towels.

The offer expires Dec. 31, 1984, and is based upon a 90-day trial of Scott toweling systems.

Announcement of the Switch-to-Scott campaign and its guarantee was made to potential switchers in publications targeted to building service operators, plant managers, institutional administrators, purchasing agents and lodging and hospitality executives.

"We at Scott feel very safe in making what may appear to be a high-risk offer," explained Shackelford. "For us, there's really about zero risk. Customers across the country have accepted our recommendations as to the type of towels to use — and the right dispensers to go with them — where savings have been substantial."

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WINNING THROUGH NEGOTIATIONS

by Jack Carter, President, Personnel Development, Inc.
at the NPA Winter Meeting

Negotiation is the art of the possible.

Each negotiator in his own way learns from mistakes and successes, both his and others, by observation, analysis, guides, research, and concepts. We increase our chances of success by more careful planning and systematic approaches.

It is not possible for a complex subject such as negotiation to list do's and don'ts to apply in all situations. Certain guides can, however, be considered in the thoughtful approach of when, where and how much.

The difficulty and importance of negotiations varies widely from the simple one-time approach to the complex continuing relationship.

Systematic analysis should enable us to check why you are successful in certain negotiations and how you can become more successful. By organizing your resources and strategy to gain objectives you minimize the chances of being surprised and develop confidence in your position to take necessary risks and protect yourself against various pitfalls in negotiations.

Everyone negotiates and frequently attains what he really wants if he is able and willing to make a fair exchange. Negotiation is an art and skill that can be improved. Although each negotiator has his own style and adapts to people and situations there are accepted fundamentals of successful bargaining. It can be rewarding and it can be costly. Emotions and feelings are important. Both positive and defensive tactics are involved. We need to be constantly on guard for ourselves and even the other party against pitfalls and mistakes.

Successful negotiators observe these basics:

1. Know what you want
2. Get facts to back it up
3. Case the other person and his position
4. Plan presentation
5. Anticipate reactions
6. Match your presentation to the other party's receiving capacity, and to the "climate"
7. Encourage feedback
8. Consider the other person's position with him — help him

9. Minimize defensive position — yours and his
10. Develop respect for ego and feelings
11. Consider methods, climate, and timing, not just facts and content

Major factors in successful negotiations:

1. Planning
2. Power
3. Skill
4. Timing

Assumptions and Strategies in the Use of Power

Self-interest is of real importance in negotiating. Most negotiators have desires, interests, needs and wants beyond their present attainment. Some people do not negotiate successfully because they do not know what they want. It is essential that we know for each situation our goals, our self-interests and the other party's goals and self-interests.

There are certain assumptions concerning power and its use which deserve examination:

Assumption No. 1 — "It is wrong to be self-concerned." Self-interest is associated with the attainment of esteem and respect, both by the individual and others. A negotiator can gain his self-interest without unduly destroying the esteem and respect of others. Interest in improving one's self and relationships with others is a major goal of human life. In negotiations, we are usually representing persons in addition to ourselves.

Assumption No. 2 — "If there is a winner everyone else has to be a loser." In negotiations one party often wins more than the other party but in continued relationships both parties need to win something, and often both parties can win substantially.

There are certain situations where coercion is not appropriate. If serious conflict situations exist, negotiations may be less than useful and collaboration impossible.

Assumption No. 3 — "The use of power means coercion and often corruption." The use of power involves risk. Some people are uncomfortable

using power and fear that it is inherently wrong. Whether or not power corrupts depends upon your own values of what you think is right or wrong and what you are willing to do.

Assumption No. 4 — "My self-interests are determined by society." Winners set their own goals high and usually do not let someone tell them what their self-interests are. You are a winner only when you exert the power necessary to satisfy your self-interests as you define them.

Assumption No. 5 — "In negotiations we should behave according to the rules — real, imaginary and implied." Winners in negotiations do observe certain norms and guides. They rarely ask what are the rules, what do other people expect of me, and am I playing the game properly.

Imaginary boundaries limit unnecessarily your freedom and power. Real boundaries are maintained by real rewards and punishment. There is a price to pay for crossing them. We need to know whether the boundaries are real or imaginary and have effective means to test them, asking the question what are the costs and rewards to me if I:

- a. Conform
- b. Go outside the boundaries
- c. Attempt to change the boundaries

Assumption No. 6 — "Risk-taking should be approached cautiously." The following are concerns and risks in risk-taking:

- being refused
- being rejected by others
- losing your position
- becoming responsible
- failing
- hurting others
- not being competent
- starting something you can't finish
- losing control
- winning
- getting people angry with you
- having people jealous of you

Most of these fears can be overcome in negotiations with planning, experience, and success. There is usually anxiety in exercising power but the possible positive consequences outweigh the doubts.

THE WHEAT INDUSTRY COUNCIL — ITS PAST, ITS CHALLENGE

by Lauren Batty, Chairman of the Board of ITT Continental Baking Company

We are all part of the wheat industry. In the past the growers, the processors and the end manufacturers have had several things in common. Historically, they have been entrepreneurs, hard working, and from what I've heard of the pasta people themselves, that goes in spades. Hands-on operation, right in with the action, know what's happening, keep abreast of things, move our business, individualistic, each with our own opinion, each of us building a business. A do-it-yourself type of an organization, a do-it-yourself type of business, a do-it-yourself type of company, and highly competitive. And all of those things are true of the entire food industry, particularly the wheat industry, where the individual means so much to the various segments of the business.

Now, what that history of the wheat industry has led us into is product and brand interest basically evolving around self-interest. And there's nothing wrong with that. I don't mean to criticize self-interest but sometimes it makes us short sighted regarding the total industry. We like to work as an industry in the organization I'm with. Frankly one of the reasons that I'm here is that my wife and I — and our family — have worked hard; we managed to achieve, and we feel we owe something to the business that helped us to be successful. So we're trying to put something back into the business that rewarded us so well.

The self-interest and the company interest probably were first and foremost in my mind as we went through our growth with the company. I believe that's true of all of us. Not to be unexpected, but it does have an end result that perhaps we can address. All of the past experiences, and the past work and the past application of those things that have been both our ideals and motivated our careers, has led to a poor consumer perception of what our products are, and what they mean, and what they do for you.

And finally, working as individuals, working as independent companies, working as corporate companies, we have addressed the industry issues in an ambivalent manner. I think that's true of most of us. It's interesting to

note and I couldn't help but hear this come through in yesterday's presentations. The pasta group either has always worked together or is commencing to work together; for example, in the work you're doing for the import issue that you currently have. I would presume you all worked together, with the GMA, when the Ethylene Dibromide issue came up. All of us got mixed up in that to some degree. As a result of all of the things we've done in the past and all the things the individuals have done, we've come to be an industry whose industry interests are rather ambivalent. And we've seen a perception created by some consumers that is erroneous regarding our products. All of the wheat based products. Those consumer misconceptions then become our challenge.

The Challenge

Our challenge then, is to work as an industry to correct these misconceptions. Thus, the Wheat Industry Council; a group of people from your industry, from my industry, from farming, from consumers, from millers, a group of companies, an industry-wide effort that has been launched to try to educate people on the nutritional value of wheat goods. We've gotten off to a fairly shaky start. Most people are aware of that. In the past year however, we've done an excellent job and the effort is accelerating all the time. It accelerates with the participation of people, including people from your industry. Joe Viviano was on the board for some time. He started out with the Council and did a nice job in our early days. You currently are represented on the Board by Paul Vermyn and you will continue to be represented on the Board.

Dr. Lund addressed the fact that your contributions to research were vital, not only vital, but having participated, the research results were very effective. I don't know how many of us in our industries have stopped to think about it but we do a lot of research work. As I recall, the number he identified yesterday was \$1.6 billion as total research going into wheat, of which durum was a large segment, but \$1.6 billion going into research,

that's just in one area. Our parent company in research across the broad technological area, including electronics and communications and all things, invests in excess of a billion dollars a year in research. We in the baking industry, Continental Baking Company, invest millions of dollars in research annually ourselves. All of us, making all that investment in research, don't seem to have the appreciation that we should have as to what we need to additionally invest in to present the end results of that research to the consumer. Because, unless we, the industry — the total wheat industry, all phases — have the capability of presenting to the consumer the benefits of wheat based foods, correct the erroneous impressions of them being fattening and non-nutritious, unless we have the resources and ability to convince the consuming public, we'll be a rather slumbering giant throughout our history. And there is no reason for us to be that. Thus, with your help, and the help of the rest of the wheat industry, to build the Wheat Industry Council to become stable, recognizable force in the food field.

We must continue to develop, continue to build, and continue to make the total wheat industry business a business that is not just a sleeping giant. A business that is not — what marketing people call — a mature business. Right? Kind of just sits there and goes along. We shouldn't allow that, we can make it a growing industry.

Complex Carbohydrates

Complex carbohydrates today are being identified as one of the most necessary elements of the human diet. The home economists and consumers are slowly beginning to perceive that and need to be more aware that wheat based foods are an excellent source of complex carbohydrates. We, as the leaders of the industry, can help them to see it if we do contribute, and if we do support, and if we do actively, beyond the contribution and support, identify our own products with it. We will convince the public properly, for their own nutritional good, that they should consume a great deal more wheat-based foods.



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I would like to introduce Joan Reynolds, the professional director of the Wheat Industry Council who does a very fine job. Marge Warder is a consultant, hired by the Wheat Industry Council who manages what we call our media tours. These involve a number of professors from colleges that we have retained to go on tour on our behalf. Marge sets the tours up for them and arranges their appearances. They open themselves up for questions on talk shows, T.V., radio, all around the country, and address the issues and benefits of wheat-based foods.

During the presentation, Tony Gioia commented that he was pleased to see the balance in our presentations to consumers. I was pleased with his reaction. We in the Wheat Industry Council said early on "Look, we know most of the money for this, just due to the sheer volume, will be coming in from the baking business, but we cannot be successful unless we talk of wheat in a balanced manner, across the full gamut of wheat products." And, I hope we are representing that as you see the presentations that were made and your interests are well represented as the pasta industry by Paul Vermeylen. The real idea is to see the value of wheat, no matter what form it comes in, and the more we all participate, the more successful we are all going to be. Nothing about this is short-term. As a matter of fact, we are probably barely crawling right now, because we have a new organization. We started campaigning for this in 1956 and it took us until 3 years ago to get legislation so that we could work together, and now, we're starting to move.

Telling the Story

The Wheat Industry Council is showing that wheat-based foods have so much value, so few calories. And we are really just starting to tell that story. Now you tell me, how can anyone not want to support a program like that for our industry? Just can't be done. Everyone of us, everyone in industry, particularly the manufacturers of the end product should get this information from the Wheat Industry Council. It's available — everyone should use it with their consumers, their customers. Everyone should try and tie whatever promotional work they do with some of the Council's themes. It's pretty much your option. We're preparing this material — doing all this research — and we're doing it with your assistance — and we're

doing it to make the industry a better industry for you and for me and those who will follow us. We owe it to ourselves and to them to really do the job.

I'll close by saying there are two phases of working in an industry or in any endeavor. You can be a participant, or you can be dedicated. And I think the most appropriate comparison with the participation and dedication is what you may have had for breakfast this morning. Bacon and eggs. Now, the chicken participated in that breakfast, but the hog was dedicated. And that's the way each of us should be — dedicated.

Durum Production Expands; Exports May Hold Steady

Heavy participation in the 1983 acreage reduction program by U.S. durum wheat growers cut back that year's production to about half the size of the 1982 crop. That reduction made a heavy dent in the ballooning supply levels of the previous 2 seasons. In turn, Durum farm prices throughout the 1983/84 season were above \$3.65 a-bushel — the only wheat class to trade above the national average loan rate all year. However, aware of this premium status, producers decided to lower acreage enrollment in the 1984 wheat program. This resulted in increased plantings of 1984 Durum acreage — 700,000 more acres than in 1983.

Current crop conditions suggest yields near 32 bushels an acre, considerably higher than last season's 29 bushels. With estimated harvest area indicated at 3.2 million acres, the 1984 Durum harvest may be 30 million bushels more than last season. A crop nearing 100 million bushels would still maintain 1984/85's supply at about 200 million bushels for the third successive season, two times greater than

the expected disappearance. The crop would leave 1984/85 ending stocks about the same as beginning stocks.

Prospects for the 1984/85 export sales of Durum hinge heavily on the price being competitive with other wheat classes. The combination of premium pricing (relative to other wheats) and the high value of the U.S. dollar place a limit on potential export expansion. This situation, which existed somewhat in 1983/84, also tends to encourage expanded domestic production by world Durum wheat users. Increased 1983 production in the EC (Italy) resulted in decreased U.S. sales to that area in 1983/84. The 1984 Durum output by Italy and Greece is expected to contribute to a drop in U.S. exports during 1984/85. The size of the Canadian Durum harvest may also limit U.S. exports to slightly under 1983/84's 62 million bushels.

Canada to Cut Exports

Canada is being forced to reduce its grain exports this year because of low stockpiles and the poorest harvest in four years.

The country's spring-wheat crop, currently being harvested, is expected to total 625.8 million bushels, down 25% from 835.9 million bushels last year, Statistics Canada, a federal agency, estimated Friday in its first crop forecast for 1984.

Spring wheat, Canada's principal wheat crop, was hurt by drought and a grasshopper infestation that hit southern regions of the big Western Canadian Grain Belt. Canada is one of the biggest grain exporters and a major competitor of the U.S. on world markets.

The low supplies mean Canada will have to restrict sales this year to its traditional customers, such as Britain, and to meeting its commitments

ESTIMATED DURUM ACREAGE, YIELD, AND PRODUCTION, 1979-83

Year	Area		Yield	Production
	Planted	Harvested		
	Million Acres		Bushels	Million Bushels
1979	4.0	3.9	27.1	106.7
1980	5.5	4.8	22.4	108.4
1981	5.8	5.7	32.4	183.0
1982	4.3	4.2	34.9	145.9
1983	2.6	2.5	29.3	73.0
1984 Forecast	3.3	3.2	32.8	105.0

more than a dozen long-term supply agreements with such countries as the Soviet Union, China, Algeria and Brazil, said Brian Stacey, a spokesman for the Canadian Wheat Board.

The Alberta Agriculture Department estimates that Canadian wheat exports will fall 25% for the year ending July 31, 1985, to 16.2 million metric tons. Barley exports may decline 28% to less than four million tons, the department says.

In its report, Statistics Canada estimated that Canada's durum wheat crop would drop 20% from last year's level to 77.6 million bushels. Canada is the biggest exporter of durum wheat, a variety used to make pasta and other foods. The barley crop is expected to decline 2.6% to 460.5 million bushels. The harvest of rapeseed, less affected by the drought, will rise 19% to 137.9 million bushels, the agency said.

Algerian Imports to Drop

Algerian durum imports are expected to be down 10% in 1984-85 to 36 mil. bu. due mostly to an improved domestic crop situation. This year's Algerian durum crop is expected to be

730,000 tons (26.8 mil. bu.) up 47% from last year's drought reduced crop. Record level European durum crop prospects will provide strong competition for U.S. and Canadian durum exports to the Mediterranean area including the two major North African markets for U.S. durum, Algeria and Tunisia.

Crop Report

Durum harvest made excellent progress under nearly ideal conditions, and about 60% of North Dakota's crop was already combined by early September.

Quality of the new durum was considered outstanding, though yields were disappointing because of the hot, dry summer weather.

Italgrani Plans St. Louis Durum Mill

A 6,000-cwt durum mill will be built in St. Louis by Italgrani U.S.A., Inc. and the target is for completion in the fall of 1985, John C. Miller, executive vice-president and general manager, stated.


The contracts for the machinery have been signed with Berga Impianti

Cereali, S.p.A., the Italian mill builder that provided the machinery for New England Milling Co., Ayer, Mass., which is owned 50% by Italgrani and 50% by Prince Company, Lowell, Mass. Mr. Miller is president of New England Milling. Production at the Ayer mill is entirely for Prince.

The mill project at St. Louis, to be 100% owned by Italgrani, will include a revamping of the company's facilities for loading and unloading barges which will facilitate the shipment of durum from the Upper Midwest. The mill will be on the site of Italgrani Elevator Co., a subsidiary of Italgrani U.S.A., Inc. Also included in the building and renovation plans are facilities for bulk handling of millfeed, fertilizer, coal and other products.

Groundbreaking for the mill is planned in six to eight weeks, with completion of construction about 13 months later.

New England Milling Co. in Massachusetts, the Italgrani-Prince venture, began grinding semolina in August and is currently working two shifts. Durum is moved to Ayer from the Upper Midwest by unit train. A formal plant opening was planned for late September.



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Pasta is in the 'Good Group'

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

One of the latest findings in nutrition research shows that pasta is in the "good group" of carbohydrates. This is because pasta produces a flat reading on insulin release, which is a sign of good health. Most of the time, when you eat a meal, your blood sugar rises and then falls. This is because the carbohydrates in the meal are broken down into simple sugars, which are absorbed into the bloodstream. This causes a spike in blood sugar, which then causes a spike in insulin. Insulin is a hormone that helps the body use the sugar for energy. However, if you eat a meal that is high in simple carbohydrates, your blood sugar will rise and then fall very quickly. This causes a spike in insulin, which can lead to weight gain and other health problems. Pasta, on the other hand, is a complex carbohydrate. It is made from whole grains, which contain a lot of fiber. This fiber slows down the digestion of the carbohydrates, which means that your blood sugar will rise more slowly and stay higher for a longer period of time. This causes a more gradual release of insulin, which is a sign of good health. In fact, research has shown that people who eat a diet high in complex carbohydrates like pasta have a lower risk of heart disease, diabetes, and obesity. So, if you want to stay healthy and control your weight, make sure you're eating enough pasta.

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Supermarket Sales Manual

Progressive Grocer magazine (July issue) has taken over the data source previously used by Chain Store Age magazine for the comprehensive report called "Supermarket Sales Manual."

They editorialize:

After what seemed an eternity of continuous increases in food prices, retailers embraced the onset of disinflation a couple of years back with open arms. Their enthusiasm was justified, considering the awesome bottom line pressures created by a depressed economy. No longer having to contend with rampant inflation and a lingering recession—conditions that had fostered fierce price wars—grocers could once again go on with the business of making money.

Unfortunately, that's not quite the way it happened last year as supermarket operators remained firmly committed to price-slashing tactics as a primary means of luring customers. The result: While the lowest retail food price hike in 15 years enabled the industry to realize "real" sales growth in 1983, the relentless use of prices as a competitive weapon served to further aggravate profits. Halfway through 1984, the price wars continue unabated.

Despite a gloomy prognosis for a speedy turnaround from price-based competition, there are forces at work that are improving the supermarket operator's ability to control what happens in the store.

Scanning, of course, offers the retailer an efficient and expedient tool for fine-tuning his product mix, sharpening his merchandising strategies and pinning down every sales transaction that takes place at the checkout. With advanced software, grocers for the first time have a way to gauge the effects of advertising support, couponing, special in-store displays and other merchandising approaches on the products they stock. The fact that this data can be generated so quickly and with such precision makes it possible for retailers to modify activities while they're still underway, instead of having to wait until they find themselves backed against the wall, an all too frequent consequence of seat-of-the-pants operations.

Meanwhile, large scale programs involving all segments of the food

industry are slowly, but steadily, beginning to fall into place. Thanks to sophisticated technology, for instance, many companies are now relying on computers to transmit purchase orders and invoices, eliminating the need for paperwork and marking the first steps toward a total electronic communications system.

While these developments offer considerable hope for a more manageable future, the current volatility of the industry places supermarket operators in a tough situation, at least for the balance of the year. Slow increases in food prices—which are expected to move at a slightly faster pace this year compared with 1983—not only make it more difficult for retailers to cover their fixed costs, but discourage many from intensifying their capital spending programs.

Clearly, grocers still have little to cheer about despite an overall improvement in operating conditions.

They then present an in-depth analysis of category performance. Those of prime interest to the pasta industry follow.

Pasta Products

1983 supermarket volume (\$ million)	\$970.46
% change from last year . . .	3.48
Gross profit (\$ million)	\$250.73
Assortment at warehouse . . .	154
Gross profit (% margin)	25.8
% total supermarket volume51

Pasta Perks Up

The pasta market is perking up, thanks to the stability of durum prices, aggressive marketing approaches by major producers, consumer interest in nutrition, and the gourmet trend.

The U.S. pasta market is expected to grow to an estimated \$1.64 billion by 1990, according to a new study by FIND/SVP, a New York-based information and research firm. Pasta volume is expected to increase from the estimated 2.349 billion pounds sold in 1983 to 2.66 billion pounds in 1990.

Annual growth is expected to hold to an average rate of 2.4% in volume and 4.8% in real dollars, bringing to an end the relatively flat market that existed from 1977 to 1982.

Industry observers say one sign of the industry's interest in increasing sales is that spending on advertising for pasta products increased last year. "Increased advertising budgets in 1982 and 1983 are an indication of the aggressive marketing approach being adopted by the major producers," says Peter Allen, FIND/SVP manager of Market Research Reports.

Annual per capita consumption of pasta in the U.S. is 10 pounds, compared to 55 pounds per person in Italy, so there's certainly room for development. Future growth is expected to come from health- and gourmet-conscious, upscale customers.

Recent health studies helped promote pasta as an alternative to meat, by noting the lower incidence of cancer and heart disease among Italian-Americans whose diet is high in pasta. The low-calorie, complex carbohydrate advantage of pasta is catching on among nutrition-conscious consumers.

Also, the high-cuisine aspect of pasta is being touted by food experts such as Craig Claiborne, James Beard and Mimi Sheraton. Gourmet-conscious consumers, following the direction of restaurants and cookbooks, are moving toward specialty shapes, flavors, and high-quality pasta.

The gourmet trend is also influencing the growth of fresh pasta lines in a number of supermarkets. Fresh pasta seems to sell best when it is made on the premises where the customer can see it being made and knows it's special. While fresh pasta retails for more than twice the cost of packaged pasta, a grocery merchandiser of a Northeastern chain observes, "Customers don't mind paying a little bit more for the best. We find customers following the 'Oreal philosophy of 'I'm worth it.'"

However, some industry executives see the fresh pasta movement as only a fad, and say that even though shoppers may be enchanted with the idea of fresh pasta for a time, it simply won't last. "Because it is freshly made," says a Northeastern pasta manufacturer, "it has a high water content. So a lot of the weight the consumer is paying for is water. They're not getting nearly the value, and I just don't believe they'll continue to buy it."

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Pasta products	Supermarket sales		Gross profit		% margin	Assessment Items ranked low to high
	1983 sales volume (\$ millions)	% of category sales	1983 gross profit (\$ millions)	% of category gross profit	Average retail gross profit %	
Macaroni dinners	\$160.80	16.57	\$28.78	11.48	17.9	9
With cheese	128.64	13.26	21.61	8.62	16.8	6
All other macaroni dinners	32.16	3.31	7.17	2.86	22.3	3
Noodle dinners	35.95	3.70	10.80	4.31	30.0	6
With meat	18.92	1.95	5.79	2.31	30.6	2
All other noodle dinners	17.03	1.75	5.01	2.00	29.4	4
Spaghetti dinners	11.35	1.17	2.74	1.09	24.1	3
With meat	3.78	.39	.88	.35	23.2	1
All other spaghetti dinners	7.57	.78	1.86	.74	24.6	2
Noodle mixes	26.48	2.73	7.55	3.01	28.5	5
Macaroni	162.69	16.76	45.48	18.14	28.0	33
Elbow	73.78	7.60	20.59	8.21	27.9	13
All other macaroni	88.91	9.16	24.90	9.93	28.0	20
Noodles	196.74	20.27	54.02	21.54	27.5	38
Flat	85.13	8.77	24.77	9.88	29.1	15
All other noodles	111.61	11.50	29.24	11.66	26.2	23
Spaghetti	221.33	22.83	61.63	24.58	27.8	27
Regular	153.23	15.81	45.97	18.33	30.0	16
All other spaghetti	68.10	7.02	15.66	6.25	23.0	11
Meat extenders	30.27	3.12	8.05	3.21	26.6	5
Pizza mix	26.48	2.73	7.34	2.93	27.7	10
One-pot dinners to which fresh meat/fish is added	64.32	6.62	14.93	5.96	23.2	10
With noodles or macaroni	24.59	2.53	5.53	2.21	22.5	3
With rice	7.57	.78	1.71	.68	22.6	2
All other one-pot dinners to which meat/fish added	32.16	3.31	7.69	3.07	23.9	5
Noodles with sauce mixes	32.16	3.31	8.91	3.55	27.7	6
All other pasta dinners	1.89	.19	.51	.20	27.0	2
Category total	\$970.46	100.00	\$250.73	100.00	25.8	154
Italian dishes, Canned	\$247.82	21.95	\$54.25	19.77	21.9	28
Spaghetti with meat	43.51	3.85	9.36	3.41	21.5	5
Spaghetti all other	39.73	3.52	7.11	2.59	17.9	4
Macaroni with meat	41.62	3.69	9.20	3.35	22.1	5
Macaroni all other	24.59	2.18	6.12	2.23	24.9	3
Noodles all types	3.78	.33	1.09	.40	28.7	1
All other Italian dishes	94.59	8.38	21.38	7.79	22.6	10
Spaghetti sauce	482.38	27.77	101.74	24.32	21.1	50

Value is the major attraction of bulk pastas (47 cents for bulk vs. 73 cents for packaged in some markets), and it seems to be catching on in some major chains across the country. Pick N' Pay, a division of First National Supermarkets, headquartered in Maple Heights, Ohio, is selling 24 varieties of bulk pasta in more than 25 of its 57 stores, according to Susan Barlow, director of the chain's consumer center.

Not everyone has had success with bulk pasta, however. A New Jersey

retailer tried two programs—a quality program and a price program, both with full variety, and neither won customer acceptance. "The biggest problem," he says, "was that within this marketplace boxed pasta was selling at almost the same price as the bulk product. The customer could get a box of Ronzoni on sale at 49 cents or private label and Prince pasta at 3 pounds for a dollar for assorted varieties.

"We do very well with some of our other bulk items like nuts and

dried fruits, but we've found in the bulk department that if the item doesn't have a distinct price advantage over similar shelf items, it will not sell."

As yet, fresh and bulk pastas don't seem to be adversely affecting packaged pasta sales. "It's difficult to track," says Don Berman, marketing manager for C. F. Mueller Co., "but from what we can determine, the effect is minimal. Our major competition is coming from regional brands moving from one market to another

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Pasta Perks Up

(Continued from page 30)

and from the Italian imports." The overall share of the Italian imports is estimated at 5% nationally, but in some Northeastern markets, such as New York, market shares run as high as 25%.

A General Agreement on Trade and Tariffs ruling in June, 1983 cut subsidies of Italian imports to the U.S. As a result of the ruling, FIND/SVP forecasts price stabilization within two years, thereby opening up an opportunity for domestic producers to capitalize on the upscale, "authentic" specialty market created by the imports.

In recent years, helped by lower durum prices, domestic producers, particularly in the Northeast, have responded to low-priced imports with intensive trade dealing and discounting. FIND/SVP predicts a leveling off of trade deals and couponing and an increase in consumer advertising to support existing and new brands and products.

On the National Front

The study also predicts that by 1990 there will be at least two national pasta brands developing from the recent entry of large national food processing companies into the market. C. F. Mueller was recently purchased by CPC International and Ronzoni was acquired by General Foods. Coca-Cola, Hershey Foods, Borden and Pillsbury are also active in the \$1 billion dry pasta market and there's every indication that these companies intend to become major factors on a national basis.

But it isn't easy to go national in the pasta market, mainly because regional brands maintain such a stronghold in some market areas. "The pasta industry grew up with a lot of local companies," explains Mueller's Bertram. "People became very accustomed to one particular brand of pasta and passed it on from generation to generation. To come up with a national brand, it will require a product with a meaningful difference. And I don't believe price is that meaningful difference."

North American Systems believes it has a new Italian product, d'Amelia pasta, that has the "difference" to make its national rollout work. The product was introduced in January

and will be getting national advertising on TV, in magazines and newspapers for its streamlined (10 SKU) line.

There is some skepticism among competitors, however. One manufacturer says, "d'Amelia's distribution has been modest so far, and I believe that they are behind where they planned to be at this point. That doesn't mean they won't get there, but bigger companies have tried it and failed."

Canned Pasta Popular

Canned meat sales might never return to the days when eating Spam was as all-American as Mom's apple pie and baseball, but the category is showing renewed vitality. Canned meat/specialties are undergoing a transformation to reposition themselves as staples for a new generation of Americans.

Nearly every subgroup within the canned meat/specialties category improved sales last year, enabling the entire category to move ahead by 7.8%.

Prepared dishes, particularly those with an ethnic flair, performed better than plain meat products last year. Consumers seem to be looking for more flavor and convenience in the canned meat/specialties they purchase and they want products that can function as a single meal.

The biggest increase within the category was recorded by Spanish/Mexican dishes, which jumped by more than 20%. Sales of these dishes have more than doubled since 1976, when they accounted for \$128.9 million in sales. Last year, for the first time ever, Spanish/Mexican dishes supplanted plain meats as the category leader, as they accounted for more than one-fourth of sales within the category.

"Mexican foods is one of the fastest growing segments of the food industry," says Thomas Brenker, executive director of the Mexican Food & Industry Board, New York. "People are eating out in Mexican restaurants, enjoying the food and becoming interested in preparing it at home."

Brenker predicts the category will continue to grow as the major packers and food companies put more marketing expertise into Spanish/Mexican products. "The canned meat category has been depressed for years,

so the packers are looking for new products to keep production going," he says. "Mexican food is a viable alternative that is helping many firms increase sales despite the problems they are having with canned meat." He cites Hormel as an example of an old-line packer that is going into the Mexican category, primarily through meat products such as chili.

Italian dishes, the second largest subgroup within the category, also did well in 1983. Close to \$250 million of canned Italian dishes were sold in supermarkets last year and this subgroup should remain a star performer for several years as marketers put renewed effort into selling Italian dishes.

"We have experienced double digit growth in our Franco-American line," says Paul Masaracchio, director of marketing at Campbell Soup Company's grocery business unit in Camden, NJ. "We improved the products and have maintained a consistent level of advertising in order to revitalize the category. With the baby boomers now having children, this category should grow dramatically during the next five years."

Canned Italian dishes have always been consumed primarily by children as a luncheon meal and as kids' interests have changed so have these dishes. Since children of the '80s are more interested in video games, science fiction movies and other futuristic pursuits, the canned pasta people have launched many products appealing to the Star Wars generation.

In February, 1983, Franco American introduced UFO's, a take off on Spaghetti O's. Some of the products have meteors (meatballs) in them. Since coming out 18 months ago, UFO's have shown significant sales gains.

The other player in canned Italian dishes — American Home Products' Chef Boy-Ar-Dee — has also been upgrading its image and changing its personality during the past year. "Chef Boy-Ar-Dee has always been synonymous with quality and nutrition. Our most recent effort in this product line has been to expand the popularity of Chef Boy-Ar-Dee brand with children," says Jack Wood, public affairs officer for American Home Products in New York.

In late 1982, the Chef introduced Zooroni (animal-shaped macaroni in

(Continued on page 34)

THE MACARONI JOURNAL



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Canned Pasta Popular

(Continued from page 32)

tomato sauce) and Cosmic Kids (pasta cut in the shape of a space ship). To meet the growing popularity of chicken-flavored products, Chef Boy-Ar-Dee brought out a chicken ravioli product in 1983. The company introduced three new products in a Pac-Man line in early 1984.

"Our canned pasta sales are growing because we have introduced new products and supported them with extensive advertising and promotions," says Wood. "Children have always been satisfied with the taste, and now we're getting them excited about the style."

Whereas Mexican and Italian food recorded strong growth last year, Oriental dishes experienced a mediocre 1983. Yet grocers still love the Oriental products because they contribute the top gross margin of any subgroup within the canned meat/specialties category.

Soup Shows Record Growth

Despite mounting consumer reluctance to eat processed foods, canned and dry soups performed remarkably well last year. The soup marketers have adapted their lines to include new styles of soup that fit in with people who like to eat on the run.

The soup companies are profiting from the new style of eating that has been termed "grazing." Instead of gathering as a family and eating three full meals a day, many people grab a bite here and a bite there. Quick-to-prepare soups appeal to these eaters.

"Soup has always been convenient, but convenience has become even more important in the business today than in the past," says Herb Baum, vice president of marketing for the Campbell Soup Co. of Camden, NJ.

Two types of soup are performing well, according to Baum. Single-strength soups, such as Campbell's Chunky Style line, and Oriental-style noodle soups are growing faster than the overall category. According to SAMI, dry soup mixes, condensed soups and even bouillon cubes also showed real growth last year, gaining sales at a rate well ahead of inflation.

The increasing popularity of single-serving soups has encouraged manu-

facturers to produce a wider variety of products aimed at single households and two-income families who purchase the single-serving soups. Younger and more willing to experiment than the population as a whole, this demographic group is more likely to enjoy greater flavor in soup. The single-serving products are usually a bit spicier and more adult in taste than condensed soups.

New Flavors in Single-Strength Soups

New York-based American Home Products, which brought out Chef Boy-Ar-Dee Soup di Pasta and Luck's Country Style soups in 1982, began to build its business in the canned soup category last year. Ten new Soup di Pasta flavors were introduced in 1983, along with five new flavors in Luck's Country Style soups.

"Soup di Pasta was a natural extension of our Chef Boy-Ar-Dee line of products," says Jack Wood, public affairs officer for American Home Products. "The Chef Boy-Ar-Dee products have been traditionally oriented toward children, but there was great potential for the line to be extended to adults." Soup di Pasta is new marketed in all regions of the country except the West Coast and Southeast.

As the original marketers of hearty, single-serving soups, Progresso Foods of Rochelle Park, NJ, helped create the soup-as-a-meal concept. The company is not idly standing by while other firms enter its single-serving domain. To complement its traditional escarole, minestrone, chickarina and other Italian styles of soups, Progresso brought out four new flavors — beef vegetable, beef minestrone, chicken vegetable and chicken minestrone — last year. This added product line has given Progresso more shelf space in markets where the brand is a strong seller.

Campbell's still accounts for a reported 80% of the condensed soup market. During the fiscal year that ended July 31, 1983, seven of Campbell's top 10 condensed soups showed sales growth. Campbell's Soup unit increased sales 5% over the previous fiscal year, with case volume up 2%.

"Our advertising program that stresses that 'Soup is good food,' has been very successful," Baum says. "People have always believed that soup is nutritious. Our advertising

simply reconfirmed that belief and encouraged consumers to buy more soup."

Campbell's offers 62 varieties of condensed soup, with chicken noodle being the best seller. Baum says broths improved sales at a much greater rate than other condensed soups last year. The vice president of marketing has also been pleased with sales of the Homestyle soups, which are aimed at adults.

"Our Homestyle soups spark the taste buds more than most condensed soups," says Baum. "They have more seasoning and also have short noodles like in dry soups." Campbell's has been so satisfied with sales of the Homestyle soups on the market that they plan to bring out two new flavors in October, the start of the soup season.

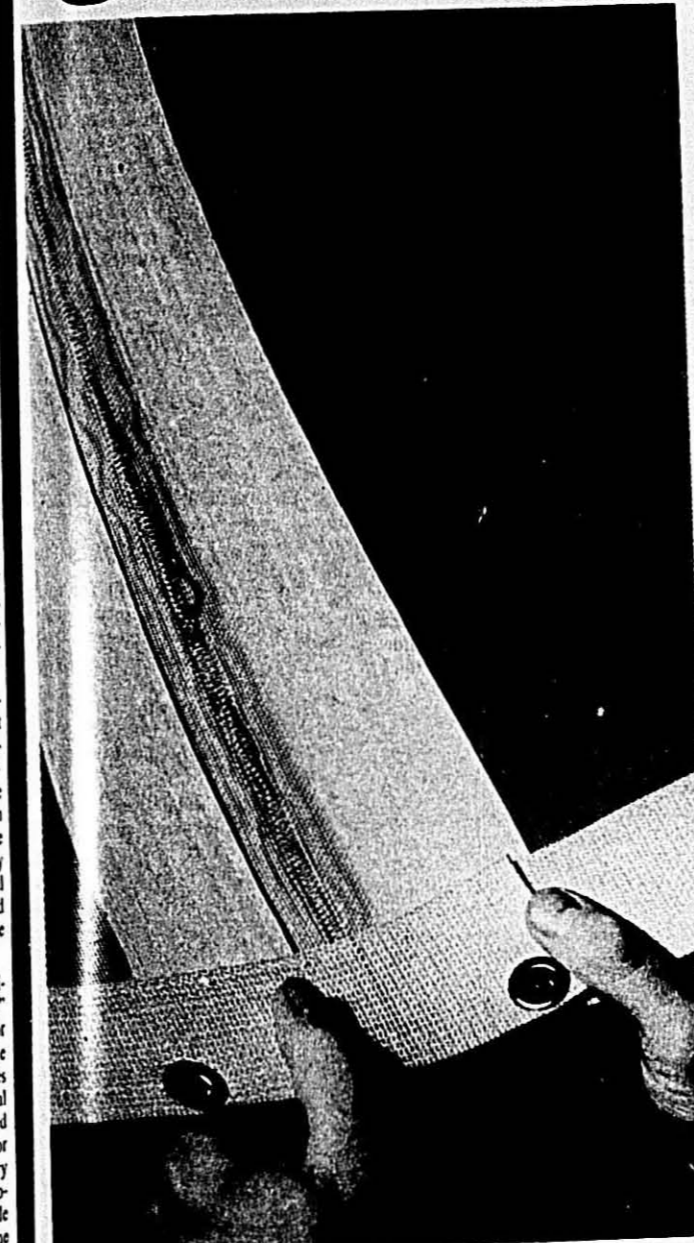
New Packaging on Horizon

On the packaging front, Campbell's has begun testing a plastic bowl type container that Baum describes as a "microwavable soup bowl." In 1983, Campbell management decided that the can was too expensive and too inconvenient in the era of the microwave oven. Millions of dollars are being spent to develop an alternative package. Baum says that the new package is still a year or two away as Campbell's attempts to develop a container that will be as recognizable and as appealing as the world-famous Campbell's soup can.

Oriental-style noodle soups continued to gain sales last year, but at a much slower rate than the phenomenal growth they boasted several years ago. As most consumers, the Oriental noodle soups have taken permanent residence along the single-strength and dry soup aisles. They often supplant the more traditional styles of soup on end display mass stackings because they can be bargain-basement priced.

"Our products have both convenience and low price in their favor," says Jim Johns, marketing supervisor for Nissin Foods of Los Angeles, the producers of Cup o' Noodles, Oodles o' Noodles and Top Ramen Oriental noodle soups. People have accepted Cup o' Noodles as a quick lunch or snack, and have been using the dry noodle lines as the basis for easy-to-prepare meals. Although some people still refuse to try our products, the

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OCTOBER, 1984

35

Soup Shows Growth

(Continued from page 34)

acceptance of the Oriental-style soups has been fantastic, especially in the West."

The Cup o' Noodles line, which suffered a sales slowdown during the recent recession, has experienced a strong upturn in sales as people have more money to spend on convenience-oriented products, reports Johns. The chicken flavor is the top seller, followed by beef. Other flavors include shrimp, beef onion and pork.

The Top Ramen line, sold under the brand name Oodles o' Noodles east of the Mississippi River, also boasted excellent sales growth last year despite increasing competition from other firms entering the dry Oriental noodle market. "When you go against drugstores and discounters selling inferior noodle products at six for a dollar, business is difficult. But in the long run, quality products win out," Johns says.

Nissin introduced chicken mushroom flavor Top Ramen about 18 months ago. The new product recently surpassed pork to become the number three flavor behind chicken and beef. In early 1984, Nissin introduced a chili flavor product aimed at the Hispanic population. Sales on this unusual flavor now being test-marketed have been mediocre.

Sauce Sales Simmer

Sales of spaghetti sauce, which accounts for more than one-quarter of the \$1.7 billion sauce category, have more than tripled since 1974 and are expected to increase 10% annually to \$1.5 billion over the next decade.

Since Italian sauces started out basically in the East, the growth in the next six to 10 years is expected primarily in the West, Midwest and Southwest.

Sauce manufacturers are improving their products with the accent on "homemade" taste. Dick Shea, general manager of Campbell Soup Company's grocery unit, says, "The quality of jarred sauce today is very good. It gets very high consumer scores."

A New Chunk of the Market

Campbell's Prego line and Chesebrough-Pond's Ragu brand, the top competitors in the category, are continuing to stir up the spaghetti sauce market with further sauce sorcery on the "homestyle" front.

Ragu introduced Chunky Garden Style Spaghetti Sauce last fall with a \$22 million advertising campaign. The new line include three varieties: one with large chunks of mushrooms and onions; one with extra tomatoes, garlic and onions; and one with green peppers and mushrooms. In May, Prego served up Prego Plus in limited test markets. Prego's new sauce line also features big chunks of Italian sausage with fresh green peppers, fresh sliced mushrooms with chunk tomatoes, and veal and sliced mushrooms.

Both companies are trying to attract shoppers who make their own sauce from scratch — estimated to be \$500 million worth of business.

Despite such shared goals, competition between Ragu and Prego is hot and heavy. While Ragu at one time held close to 65% of the nation's market, its share is now closer to 50%. In the last three years, Prego has increased its market share to about 26%. Even so, Ragu's volume increased about 20% last year, reflecting the expansive growth of the category.

New "homemade," "natural," and "chunky-style" items are also adding interest in other areas of the sauce market. Ragu features a chunky-style Pizza Quick Sauce, as well, and Hunt-Wesson has introduced its All Natural Barbecue Sauce with chunks of vegetables. General Foods has added "stronger flavor and thicker texture" to its Open Pit Barbecue Sauce and Kraft claims its barbecue sauce now has more "cling" because it's so thick it stays on.

Kitchen Accessories

Smart kitchen accessories are guaranteed to turn even the novice into a proper chef. Come packed in an Italian tri-color red, white and green pasta-type gift box there is a chef's tie towel, striped chef's apron with oven mitt and pot-holders to match, and wipe-clear decorated plastic placemats. Retail prices: towel, \$6, quilted mats 2 for \$10, apron \$15, mitt \$6.50, pot-holder \$3.50, and plastic mats 2 for \$6. Available from Alfredo Fettuccine, Trendsetter, a division of Armored Group, 12730 Yukon Avenue, Hawthorne, California 90250.

Avoiding Strikes in Grocery Chain and Food Industries

"Can Strikes Be Avoided in Food Distribution and Grocery Chains?" is

the subject of a new study just released by University Research Center. Projections are made in the study as to what the food industry might expect in the way of strikes, and what can be done to avoid such upheavals. The study is available free to executives in the food industry.

Grocery chains and food processors are encountering strikes in increasing numbers, the study finds. In 1984, "we will see some heavy bargaining—and strikes—in the retail and wholesale food industry where contracts covering some 300,000 members of the United Food and Commercial Workers are up for renewal. In 1983, wage increases under food store contracts averaged five to six percent—as against 2.6 percent average for the rest of unionized industry. In 1984 and 1985, food unions will continue to demand more."

The study outlines a program of five steps that management should take to avoid—or minimize—the possibility of strikes in the food industry.

Single copies of the study are available free to executives by request to Dr. Matthew Goodfellow, Executive Director, University Research Center, 121 West Adams, Chicago, IL 60603.

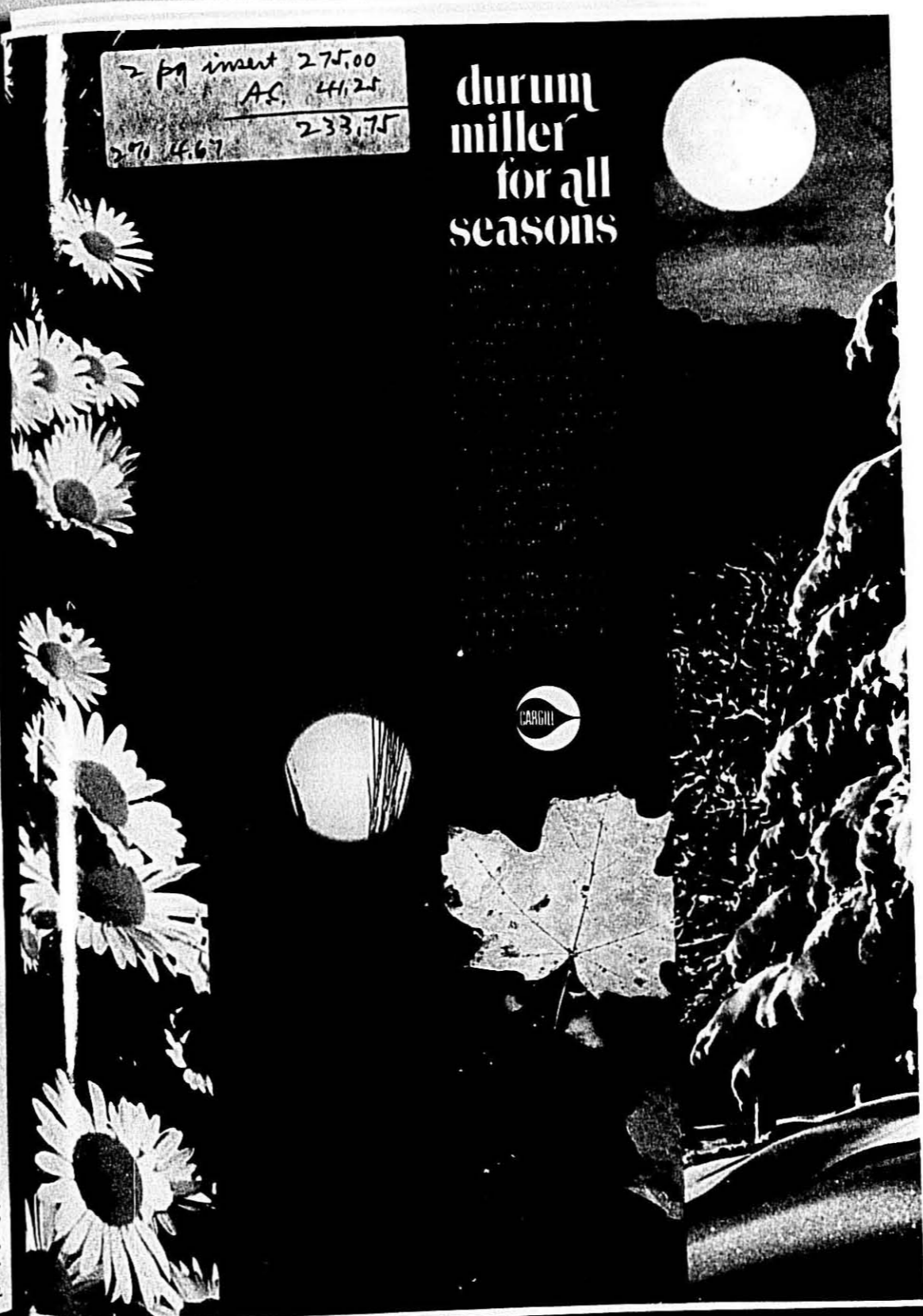
From Progressive Grocer Magazine

- Even though the CPI for food-at-home remained relatively flat in 1983, some consumers feel prices, particularly in produce, increased a great deal.
- Men are a growing presence in the supermarket. Forty-seven percent are now involved in grocery buying.
- With easing inflation and decreasing unemployment, shoppers are relaxing their budget-minded shopping activities.
- The one-stop-shopping capability of a supermarket scores high with lower income shoppers.
- Wholesalers show an increase in net sales, tonnage and gross margin.
- Inventory turns and sales per employee improve for wholesalers.
- Wholesalers continue to increase their share of total volume handled via backhaul.
- Cornell University's report, "Operating Results of Food Chains," shows record high gross margins, but a drop in net operating profits.

THE MACARONI JOURNAL

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Hershey Chocolate Diversifies

Hershey Foods Corporation acquired San Giorgio Macaroni of Lebanon, Pa., in 1966 as well as Delmonico Foods of Louisville, Ky. In 1978 they purchased Procino-Rossi Corporation of Auburn, N.Y. and the next year Skinner Macaroni Company of Omaha, Nebr. The stories of Delmonico and Procino-Rossi follows:

Delmonico Foods

Joseph P. Viviano came to the United States from Palermo, Sicily, in 1899. He and his four brothers opened a bakery and butcher shop in St. Louis. It was only a matter of time before they tested the local appetite for the food on which they were raised — spaghetti and noodles. They began by preparing small batches daily by hand, selling them while still wet to curious neighborhood customers.

Their spaghetti and noodles found favor so quickly that the Viviano brothers decided to drop butchering and baking and focus all of their considerable energies on the burgeoning pasta business. Fortune smiled on them.

The Viviano family took another fateful step forward in 1919 when they dispatched Joseph and two of his brothers to Chicago to open and manage a plant. Sales grew to such an extent that in 1928 Joseph, though still young, sold his share of the business and retired. Almost immediately he regretted his decision, for he was restless and couldn't put the pasta



Joseph P. Viviano



Peter J. Viviano

business out of his mind.

He wasted no time; he looked over the country, saw that in Kentucky he would not be competing with his brothers, and set about building a plant on Floyd Street in Louisville.

Kentucky Macaroni Co.

The new plant opened as the Kentucky Macaroni Company in the fall of 1928. William B. Harrison was the mayor of Louisville at the time, and he rolled out the red carpet. While it was a great day for the fledgling company, it was a more auspicious one for Louisville, for the city desperately needed industry, and the new plant, employing 350 persons, was one of the largest employers in Kentucky. Of even greater significance, the plant continued to prosper all through the great depression while businesses everywhere were folding or shrinking. And this in spite of two early setbacks.

The first was a fire only months after opening which gutted the entire two floors, leaving only the walls. Restoration was rushed and a third floor added. Another more disastrous fire in 1932 destroyed all three floors. Extensive changes were made, and the plant was enlarged and improved.

Other changes were in the making. In 1946 the company adopted the name Delmonico, borrowing it from

a New York restaurant famous throughout America for more than 100 years for the excellence of its menu.

The Pazzolos

Another immigrant from Sicily was Antonio T. Palazzolo, who was a relative by marriage to the Vivianos. He was a fruit and vegetable vender in St. Louis in 1905 before becoming a wholesaler. In 1917 he moved to Detroit and became a distributor of macaroni products. In 1919 he opened a business in Cincinnati. His small plant became one of the largest producers of macaroni in the state, and the family ran a wine distributing business that was the largest in Ohio.

With his five sons, Palazzolo also operated the famed Caproni's restaurant, a pizza shop, and held interest in several Cincinnati theaters.

When Mr. Palazzolo died in 1955, his boys merged with the Vivianos at Delmonico Foods. Peter Palazzolo became treasurer, while Dominic Palazzolo was in charge of sales. The presidency of the company went to Thomas Viviano, son of Joseph Viviano who became Board Chairman.

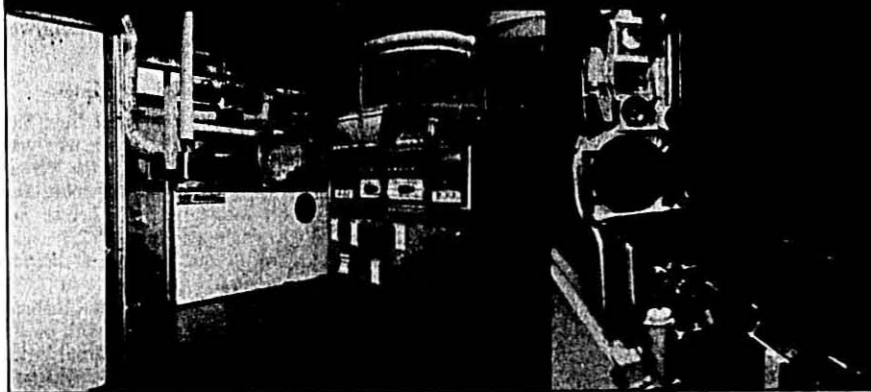
A year later the group became involved in a multi-million dollar shopping center in the Hyde Park section of Cincinnati. The five Palazzolo brothers and the two Viviano brothers teamed up with Rube Shor of Shor,



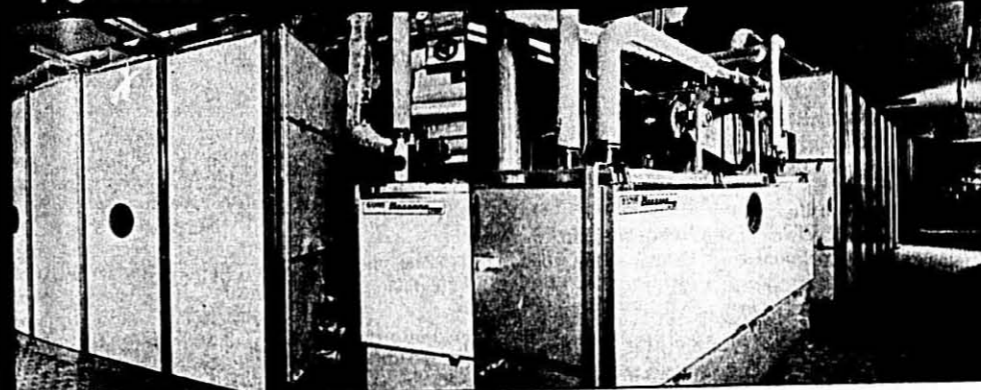
Joseph P. Viviano

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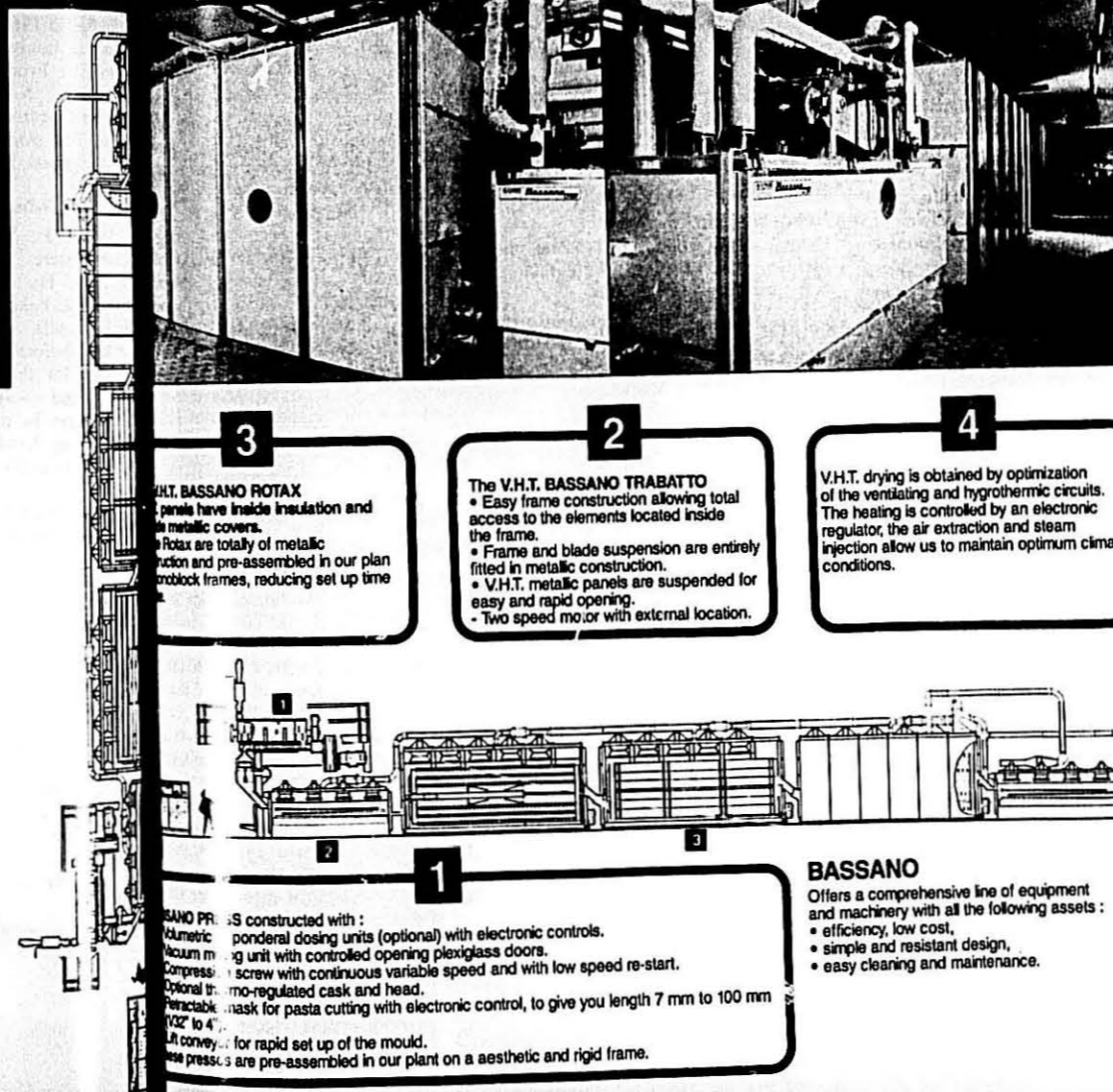
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 • easy cleaning and maintenance.

FIELD ROAD
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Hershey Chocolate Diversifies

(Continued from page 39)

Inc., an associate of the Palazzolos in the theater business.

In 1960 Peter J. Viviano became president of the company and engineered the sale of the business to the Hershey Chocolate Company in 1966. No changes in the management of personnel in Delmonico Foods were made.

Peter J. Viviano was elected president of the National Macaroni Manufacturers Association in 1968 and served a two-year term. In 1972 he was succeeded by his son Joseph P. Viviano as President of Delmonico Foods. In 1975 Delmonico Foods became a division of San Giorgio Macaroni, Inc., also owned by Hershey Foods Corporation, and Joseph P. Viviano was named President of the combined operation. He was elected President of the National Pasta Association in 1982; appointed Senior Vice-President of the Hershey Foods Corporation in 1984.

Procino-Rossi

Procino-Rossi Macaroni Corporation was acquired by Hershey in 1978. It was an important brand in upper New York State.

The company was founded in 1916 in Syracuse by Alfredo Rossi and his father-in-law Nicholas Procino. Three years later they moved to Auburn, New York.

Alfredo, who had been an engineer in the Italian army setting up bakery field units, had the mechanical background to find employment in a macaroni plant when he emigrated to the United States. Living with the Procinos in Syracuse, it was a natural evolution that he marry Lena Procino and went into business with her father. His brother-in-law, Jack Procino, was active in the business since the time he was a boy.

Jack was a bachelor, but the Rossi's had a number of children and employed a number of aunts and uncles in the family business. The oldest son was Nicholas A. Rossi, raised in Auburn in the Finger Lake district of New York State and educated in local schools before entering Clarkson College of Technology where he obtained a bachelor of science degree in mechanical engineering. While in school he was a four



Nicholas A. Rossi

letter man in basketball, baseball, football, and golf. After school he had two years of service in the finance corps of the army.

He took an active interest in civic affairs, and as chairman of the government affairs committee of the National Macaroni Manufacturers Association, before becoming its president in 1974-76, he made this statement in a committee report: "I would like to relate to you the philosophy behind the need for a national affairs committee. Basically the question is whether or not we are going to take an effective posture or be on the offense."

"A few years ago our industry was confused in its approach to government and unsure as to how we could become a force to make our voice heard. So we set up a Washington Affairs Committee and held some meetings in Washington to learn about the pattern of government and how it works."

"I went to several seminars for the National Association of Manufacturers and learned how they operated on meeting members of Congress on a man-to-man basis. I learned something about the workings of committees, and on what committees various Congressmen served. This is valuable information when you run into a problem."

"We cannot sit back and then jump up and put out the fires. There are going to be too many fires in the future. It is imperative that we know our Congressmen and help them. We must be active in politics and get good men elected. If he is going to be the man who helps you when you need him, you will have to help him obtain the office."

"We can talk about hiring lobbyists or moving the office of the Association to Washington, but it will constantly require vigilance and the work of everyone in the industry to see that we stay on the offensive, because that is how the ball game is played."

Buy Recommendations

In the summer of 1984 the stock brokerage firm of Gruntal & Co. of New York City issued a "buy recommendation" to investors for Hershey Foods stating: "Hershey Foods, one of the leading domestic producers of chocolate and confectionery products, has significantly improved its position since the mid-1970's. This has been accomplished through aggressive marketing of new products, skillful management of commodity costs, highly effective diversification into the fast food industry through the purchase of the Friendly Ice Cream Chain, and the success of San Giorgio-Skinner, now the second largest producer of branded pasta products in the U.S. having risen from seventh place in 1966."

Hershey Foods Announces Record Sales

Hershey Foods Corporation announced record consolidated sales and earnings for the second quarter ended July 1, 1984. Net sales were \$402,725,000 compared with \$357,280,000 for the second quarter of 1983. Record net income for the quarter was \$19,090,000, or \$.61 per common share, compared with \$16,531,000, or \$.53 per common share, for the same quarter last year.

Net sales for the first six months of 1984 were a record \$836,197,000 compared with \$779,196,000 in the first half of 1983. Net income for the first six months of 1984 was \$8,650,000, or \$1.23 per common share, compared with \$40,350,000, or \$1.29 per common share, for the same period in 1983.

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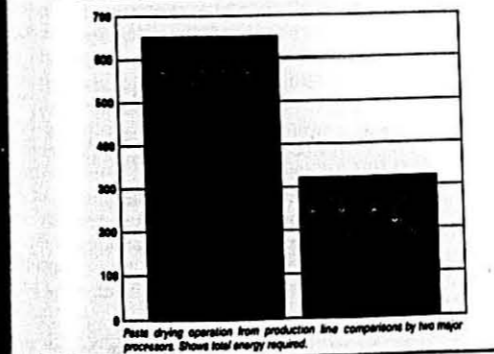
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Maintenance	████████████████████	██████████
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—C. "Mickey" Skinner, executive vice president, Skinner Macaroni Company.

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—Carlo Varesco, plant manager, Golden Grain Macaroni Company, Bridgeview, Illinois plant

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Cut Out the Noise!

Thousands of employees have suffered significant hearing losses over the years due to noise in the workplace, but help has finally arrived.

After 10 years of deliberation and the compilation of close to 40,000 pages of public records, the Occupational Health and Safety Administration (OSHA) has issued the Hearing Conservation Amendment . . . an amendment which carries the force of law.

Effective April 7, 1983, the HCA called for six major areas of reform to which all companies must conform:

- monitoring
- audiometric testing
- audiogram evaluation
- hearing protectors
- training
- recordkeeping

Monitoring noise exposure levels. The HCA requires employers to identify employees exposed to between 85 decibels (dB) and 130 dB during an average eight-hour working day. It is expected that such monitoring, using sound level meters or dosimeters (or other instrumentation, such as the frequency analyzer, tape recorder, graphic level recorder, oscilloscope, or impact noise analyzer), will not only identify employees who must be enrolled in a hearing conservation program, but it will also point out employees for whom hearing protection is mandatory and "determine the amount of attenuation that hearing protectors need to provide."

Audiometric testing, including baseline audiograms and annual audiograms, "will measure employee hearing acuity over specific time periods and provide an opportunity for employers to educate their workers about their hearing and the need to protect it." This testing must be made available to all employees who have average noise exposure levels of 85 dB or more and must be conducted by a qualified technician. Responsibility for the implementation of the hearing training program must be charged to a professional audiologist, otolaryngologist or physician.

The baseline audiogram, which should be administered during the first six months of employment, "is the ref-

erence audiogram against which future audiograms are compared. "The annual audiogram, which must be conducted within a year of the baseline audiogram, will measure changes in hearing levels and determine what follow-up measures should be taken to prevent further hearing loss.

Audiogram evaluation is necessary to determine if a standard threshold shift (STS) has occurred. A careful analysis of the annual audiogram will show whether a shift of 10dB or more at 2,000, 3,000 and 4,000 Hz has taken place in either ear. "If an STS is identified, employees must be fitted or refitted with adequate hearing protectors, shown how to use them and required to wear them. In addition, employees must be notified within 21 days from the time the determination is made that their audiometric test results showed an STS." If the STS does not persist, the employee with less than a time weighted average of eight hours per day exposure to 90 dB may discontinue wearing hearing protectors.

Hearing protectors must be available to all employees exposed to noise levels within the 80 dB to 130 dB range. Conformity to this requirement will forestall future hearing loss for those employees. However, employees should have the option of deciding what size and type of hearing protectors are the most suitable for their particular jobs and workplaces. Furthermore, they should be shown "how to use and care for their protectors and must be supervised on the job to ensure that they continue to wear them correctly." Employers should be continually aware of any changing conditions within the workplace and should check to see if the hearing protectors issued are adequate.

Training employees well should increase awareness of just how important hearing conservation can be. It is further hoped that the employees will be motivated by the training they receive to wear their hearing protectors and to cooperate with audiograms testing.

Besides the basic hearing training course that is available, the program may be implemented by other audiovisual materials offered through the National Safety Council. "The training program may be structured in any format, different parts being conducted by different individuals and at different times as long as the required topics are covered."

Recordkeeping is essential to the success of the HCA. "Noise exposure measurement records must be kept for two years. Records of audiometric test results must be maintained for the duration of employment of the affected employee. Audiometric test records must include the name and job classification of the employee, the date of the examiner's name, the date of acoustic or exhaustive calibration, measures of the background sound pressure level in audiometric test rooms, and the employee's most recent noise exposure measurement."

The total cost of the program is estimated at \$210.3 million per year or an average cost per employee of \$10.50 per year. . . . A small price to pay for hearing.

The Pellaton Automatic Lasagne System

A New Method of Handling Lasagne by Charles C. Rossotti, President, Rossotti Consultants Associates, Inc.

The Pellaton Manufacturing Company's Lasagne System was developed several years ago for The American Beef Company of Fresno, California.

The original System split the output of the Lasagne from a 100 inch Demaco stripper and conveyed the Lasagne out both sides of the stripper to identical packaging lines. The Lasagne was then accumulated, cut to length, divided, counted and sorted into groups so that the Lasagne could be hand placed into the pockets of the automatic load carton machine.

During the past one and one-half years, the Pellaton Lasagne Packaging System has been modified to handle 80 inch Demaco line. Lasagne is now being delivered out one side of the stripper to a single packaging line. Recent improvements to the accumulating section by the Pellaton Manufacturing Co. and the addition of an automatic case packer, enables the Patented System to package 1 lb. or 1/2 lb. cartons at the rate of approximately 2000 lbs. per hour, using only three people.

The advantages of the System are:

1. Great labor savings, allowing the cost of the machinery to be recovered in less than two years on a given sufficient volume of product.

(Continued on page 46)

THE MACARONI JOURNAL

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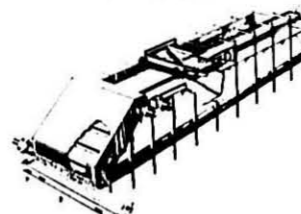
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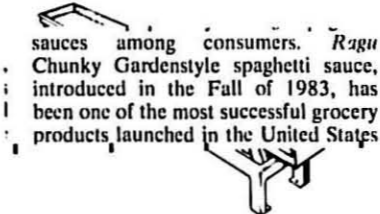
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saucers among consumers. *Ragu* Chunky Gardenstyle spaghetti sauce, introduced in the Fall of 1983, has been one of the most successful grocery products launched in the United States



The new headquarters of Food Engineering Corporation feature 60,000 sq. ft. manufacturing facilities with adjoining engineering, research test lab and administrative offices.



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C. L. Norris Dead

Carlyle L. (Bud) Norris died at the age of 86 in early August in Sun City, Arizona. He is survived by wife Rose; son and daughter-in-law Donald and Beverly Norris of Minneapolis; daughter and son-in-law Nancy and John Gunn of West Covina, California; daughter Susan Cygnet of Minneapolis; five grand-children and three great grand-children.

Mr. Norris was the former Vice President and general manager of the Creamette Company, Minneapolis (see "Pasta Makers in America, page 23, Macaroni Journal, June, 1984 issue). As president of the National Macaroni Manufacturers Association in



C. L. Norris

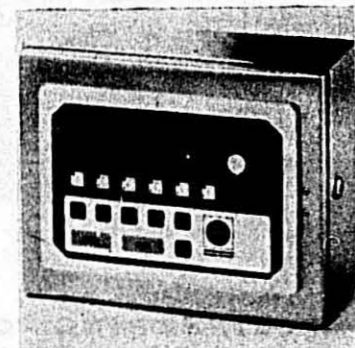
1948-1950 his administration incorporated the National Macaroni Institute as the product promotion arm of the industry and pioneered participation in the Langdon, North Dakota Durum Show and in developing good relations with the growers of durum wheat.

New AZO Scale Controller

In a continuing effort to further improve all aspects of their bulk handling systems, AZO Incorporated has developed the model DK 1-6 scale controller.

This single component controller provides digital weight selection, digital weight readout, silo selection and all other operator controls in a compact, stainless steel enclosure with a membrane keyboard. The DK 1-6 Scale controller is only available as an integral part of AZO's bulk material handling systems.

For more information, contact AZO Incorporated, P.O. Box 18170, Memphis, Tennessee 38181, (901) 794-9480.



Pellaton Lasagne System

(Continued from page 3)

- The machinery paces the workers for greater worker efficiency.
- One-half or one lb. cartons can be packaged at the same rate.
- Less breakage of Lasagne due to less handling, thus giving greater yields.
- Lasagne is packaged directly from the stripper into the carton with only two people actually handling the Lasagne.
- A unique saw system, in conjunction with the Lasagne counters, allows for very close tolerances on individual carton weights.
- The carton machine and case packer can be changed to package either 1/2 lb. or 1 lb. cartons.
- The stripper can be operated so that Lasagne can be discharged out one side to its packaging line and long goods can be discharged out the opposite side and discharged to its packaging system.
- Long Goods, if desired, can be handled on the Lasagne conveyor system through the saws, then removed and delivered to its own packaging system.
- The Lasagne System can be arranged to deliver Lasagne to suit most any plant layout by using the Special Pellaton curved conveyors.
- This System is practical for a minimum annual production of 3,000,000 lbs. a year.
- The System is capable of packaging approximately 200,000 lbs. of Lasagne per hour, using only three people.

Anyone wishing further information on this System should contact Rossotti Consultants Associates, Inc., 158 Linwood Plaza, Fort Lee, New Jersey 07024. Telephone: (201) 944-7972. The Rossotti Consultants Associates, Inc., are Sales Agents for the Pellaton Lasagne System in the United States, Canada and Europe.

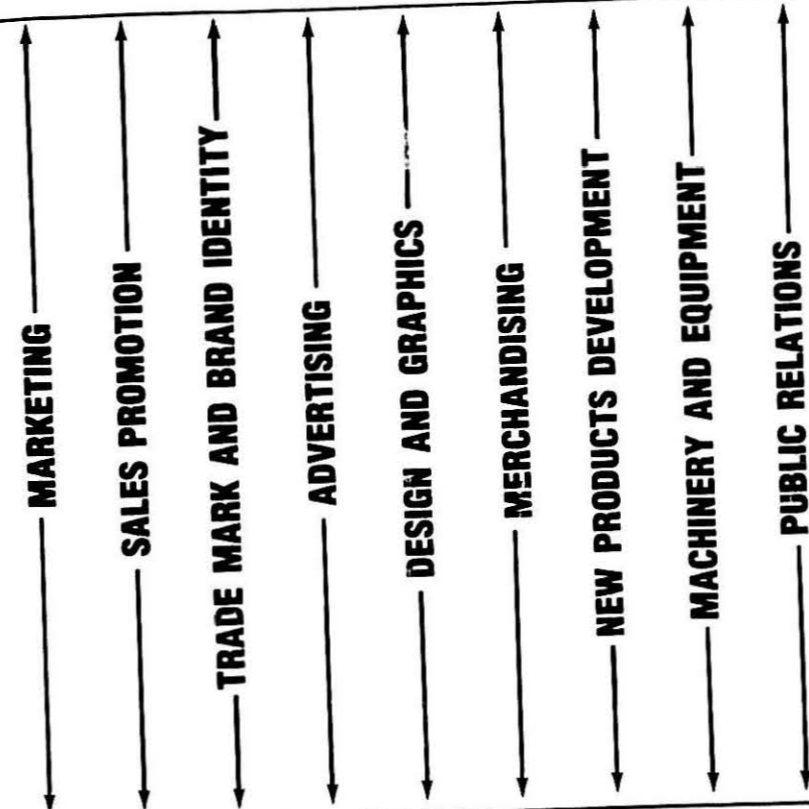
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