BULKY DOCUMENTS

(exceeds 300 pages)

Proceeding/Serial No: 91161373

Filed: 03-20-2006

Title: Opposer's Request to Substitute Exhibits to it's Brief in Opposition to Applicant's Notion for Partial Summary Judgment, and, in the alternative, Motion to Reopen.

Part 1 **of** 3

OIPE IAP72
MAR 20 2006
PATENT & TRADEMARK OFFICE

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

AMERICAN ITALIAN PASTA COMPANY Opposer, v. BARILLA G. E R. FRATELLI-SOCIETA PER AZIONI, Applicant.	))))))))))	OPPOSITION NO.: 91-161,373 MARK: BARILLA - AMERICA'S FAVORITE PASTA

TTAB

OPPOSER'S REQUEST TO SUBSTITUTE EXHIBITS TO ITS BRIEF IN OPPOSITION TO APPLICANT'S MOTION FOR PARTIAL SUMMARY JUDGMENT, AND, IN THE ALTERNATIVE, MOTION TO REOPEN

On March 6, 2006, AIPC submitted its Brief in Opposition to Applicant's Motion for Partial Summary Judgment and, in the alternative, Motion to Reopen. On March 13, 2006, AIPC's counsel learned that two of the Declarations submitted with that Brief were missing the associated exhibits. AIPC immediately sent the missing documents via overnight mail to Barilla's counsel.

Therefore, for the Board's convenience, AIPC respectfully requests that the attached set of Exhibits be wholly substituted for the entire set of exhibits that were originally attached to its Brief.[1] Since Barilla's counsel received those documents one day after learning of their omission, there is no prejudice to Barilla. The omitted documents was an inadvertent error. Attached is a Declaration of Katie Bray explaining the error.

[1]Again, some of the documents have been designated "Confidential" and are filed under seal herein.

03-20-2006
U.S. Patent & TMOfc/TM Mail Rcpt Dt. #26

AIPC's counsel invites the Board to contact them should any questions remain.

Respectfully submitted,

AMERICAN ITALIAN PASTA COMPANY

By its attorneys,

Thomas H. Van Hoozer, Reg. No. 32,761
Cheryl L. Burbach
HOVEY WILLIAMS LLP
2405 Grand Boulevard, Suite 400
Kansas City, Missouri 64108
816/474-9050

Attorneys for Opposer

CERTIFICATE OF SERVICE

I hereby certify that on the 15th day of March, 2006, I served the foregoing by causing a true copy thereof to be sent via first class, postage paid, to the following:

Carla C. Calcagno
ROTHWELL, FIGG, ERNST & MANBECK P.C.
1425 K Street, NW, Suite 800
Washington, DC 20005

OIPE IAP72
MAR 20 2006
PATENT & TRADEMARK OFFICE

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

AMERICAN ITALIAN PASTA COMPANY	)	OPPOSITION NO.: 91-161,373
	)	
Opposer,	)	MARK: BARILLA - AMERICA'S FAVORITE PASTA
	)	
v.	)	
	)	
BARILLA G. E R. FRATELLI-SOCIETA PER AZIONI,	)	
	)	
Applicant.	)	

DECLARATION OF KATIE R. BRAY

I, Katie R. Bray, declare:

1. I am currently employed as a Litigation Paralegal by the firm of Hovey Williams LLP. I make this declaration based upon my personal knowledge.

2. I assisted in the preparation of the exhibits and copies of *Opposer's Brief in Opposition to Applicant's Motion for Partial Summary Judgment, and, in the Alternative, Motion to Reopen.* 21 exhibits were attached to the Brief, totaling over 1,000 pages.

3. I inadvertently omitted Exhibits A, B, and D to the Declaration of Eric Johnson and Exhibits A - F to the Declaration of Drew Lericos.

4. Upon learning of the omission, the exhibits were immediately copied and sent via overnight mail to Barilla's counsel.

I declare under penalty of perjury pursuant to 28 U.S.C. § 1746 that the foregoing is true and correct.

Dated: March 15, 2006

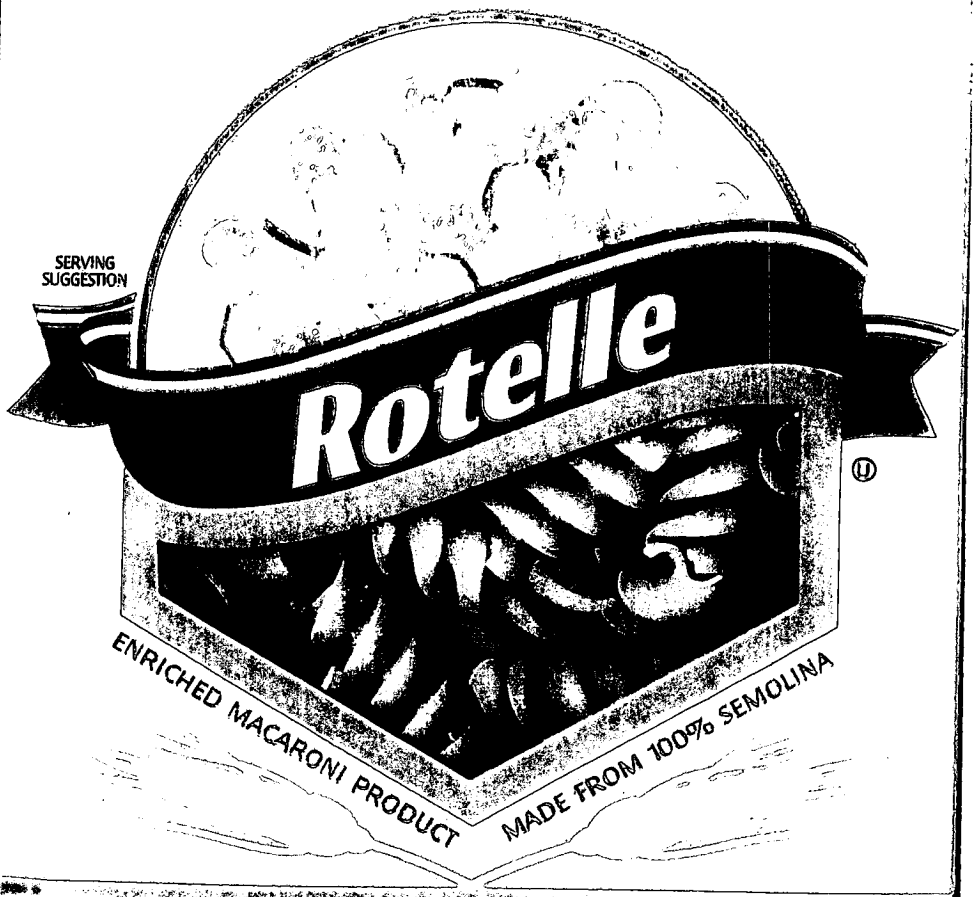
Katie R. Bray

Exhibit 1

AMERICA'S FAVORITE PASTA

Mueller's®

QUALITY SINCE 1867



NET WT 16 OZ (1 LB) 454g

Mueller's®

For over 135 years, Mueller's pasta has cooked up perfectly every time because it's made from pure semolina milled from the highest quality durum wheat. Rotelle means "small wheels" in Italian. This twisted shape holds sauces and tasty bits of vegetables, meats and cheeses, so it works well in a variety of dishes and is a popular choice for salads.

CLIP & SAVE!

8 oz (1/2 pkg) MUELLER'S Rotelle, cooked, rinsed with cold water and drained
3/4 cup Italian dressing
1 medium zucchini, halved lengthwise and thinly sliced
4 oz salami, halved lengthwise and thinly sliced
10 cherry tomatoes, quartered
1/4 cup grated parmesan cheese
Lettuce leaves (optional)
Red onion rings (optional)

In large bowl combine all ingredients; toss to coat. Spoon onto lettuce lined platter. If desired, garnish with red onion rings.

MAKES 6 SERVINGS PREP TIME: 15 MINUTES

CLIP & SAVE!

1 Tbsp vegetable or olive oil
3/4 lb boneless skinless chicken, cut into thin strips
1 small red pepper, coarsely chopped
2 cloves garlic, minced or 2 tsp garlic powder
1/4 tsp pepper
1-1/2 cups water
1 Tbsp cornstarch
1/4 tsp dried thyme
3 cups frozen broccoli florets
2 chicken bouillon cubes
8 oz (1/2 pkg) MUELLER'S Rotelle, cooked and drained
2 Tbsp grated parmesan cheese

In large skillet heat oil over medium-high heat. Add chicken, red pepper, garlic and pepper. Stirring constantly, cook 4 minutes or until chicken is lightly browned. In small bowl stir water, cornstarch and thyme; pour into skillet. Add broccoli and bouillon cubes. Stirring constantly, bring to a boil over medium heat and boil 1 minute. Reduce heat to low; stirring occasionally, simmer 4 minutes longer. Toss with Rotelle; sprinkle with parmesan cheese.

MAKES 4 SERVINGS PREP TIME: 20 MINUTES

Exhibit 2

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

AMERICAN ITALIAN PASTA COMPANY Opposer, v. BARILLA G. E R. FRATELLI-SOCIETA PER AZIONI, Applicant.	)))))))))))	OPPOSITION NO.: 91-161,373 SERIAL NO.: MARK:

OPPOSER'S ANSWERS TO APPLICANT'S FIRST SET OF INTERROGATORIES

Pursuant to 37 C.F.R. § 2.120 and Rule 33 of the Federal Rules of Civil Procedure, Opposer American Italian Pasta Company ("Opposer") makes the following responses and objections to Applicant's First Set of Interrogatories.

PRELIMINARY STATEMENT

Opposer's search for information and documentation in connection with these interrogatories was conducted with the necessary degree of diligence to locate responsive information and documents. Opposer reserves the right to revise, correct, add to, supplement, or clarify any of its answers to Applicant's interrogatories as may be necessary.

GENERAL OBJECTIONS

1. Opposer objects to Applicant's interrogatories to the extent that they seek information subject to the attorney-client privilege or other privilege.

2. Opposer objects to each interrogatory to the extent it seeks information which have been prepared in anticipation of litigation or for trial, or otherwise subject to protection under the work product doctrine or Rule 26(b)(3) of the Federal Rules of Civil Procedure.

3. Opposer's answers to these interrogatories are subject to the General Objections as well as the objections made to each specific interrogatory. To extent these General Objections are applicable, they are incorporated by reference into each of Opposer's answers and by responding to certain of Applicant's interrogatories, Opposer does not waive these General Objections or any specific objections to particular requests. Opposer will produce requested information where otherwise appropriate. However, Opposer reserves its right to object to the admission of such information or documents at trial.

4. Opposer objects to each interrogatory to the extent that it calls for a legal conclusion.

5. Opposer objects to the production of information equally available to Applicant from third-party sources.

6. Opposer objects to the Applicant's interrogatories on the grounds that they are overly broad and unduly burdensome, seek information and documents which are neither relevant nor reasonably calculated to lead to the discovery of admissible evidence, and to the extent they seek to impose obligations on Opposer beyond those required by the Trademark Trial and Appeal Board Rules and Federal Rules of Civil Procedure.

7. Opposer objects to Applicant's interrogatories on the grounds that they are overly broad in time and scope.

8. Opposer's responses to these interrogatories do not waive any attorney-client privilege or work product protection, nor does it waive any right to challenge the use of any such information at trial or other proceeding in this action.

9. Opposer objects to these interrogatories to the extent that they seek confidential commercial information and trade secrets of Opposer or its predecessors in interest. Upon entry of a suitable protective order, Opposer will supplement its answers as appropriate.

RESPONSES TO APPLICANT'S FIRST SET OF INTERROGATORIES

INTERROGATORY NO. 1

Identify the officer(s) or employee(s) of AIPC primarily responsible for the sales and marketing of goods under Opposer's Mark.

ANSWER

Opposer objects to this interrogatory as being overly broad, unduly burdensome, and vague and ambiguous as requiring identification of officers and employees primarily responsible for sales and marketing. Notwithstanding the foregoing objection, Opposer identifies the following officers and employees of Opposer which have principal responsibilities in connection with sales and marketing of its pasta items bearing Opposer's Mark: Tim Webster, President & CEO; Dan Trott, Executive Vice President Sales & Marketing; Walt George, Executive Vice President Operations & Supply Chain; Neal Clute, Director of Purchasing & Packaging Development; Celeste Wegner, Director, Packaging Services; Drew Lericos, Director of Marketing, all located at American Italian Pasta Company, 4100 North Mulberry Drive, Kansas City, MO 64116, but may be reached through Opposer's counsel.

INTERROGATORY NO. 2

Identify and describe each pasta item ever sold by AIPC or on its behalf under Opposer's Mark.

ANSWER

Opposer objects to this interrogatory as vague, overly broad in time and scope and unduly burdensome, and not relevant to the present dispute. Notwithstanding the foregoing objection, and subject to supplementation as additional information is discovered, Opposer identifies the following

styles and packaging sizes currently known to Opposer where the mark AMERICA'S FAVORITE PASTA is or has been used on the packaging for the goods:

Bowties	12oz, 96 oz
Elbows	64 oz, 48oz, 32oz, 16oz, 8oz
Ridged Elbows	16oz
Mostaccioli	16oz
Tri Color Bowties	12oz
Tri Color Ruffles	12oz
Tri Color Shells	16oz
Tri Color Twists	12oz
Tri Color Rotini	12 oz.
Spaghetti	16oz, 8oz, 32oz, 48 oz.
Fine Linguine	16oz
Rotini	16oz
Gemelli	16oz
Jumbo Shells	12oz
Thin Spaghetti	16oz, 8oz, 32oz, 48oz
Angel Hair	16oz
Vermicelli	8oz, 16oz
Mini Penne	16oz, 500g
Ruffles	16oz, 96 oz.
Small Sea Shells	16oz, 96 oz.
Ziti	16oz

Lasagna	8oz
Linguine	16oz
Corkscrews	16oz
Rigatoni	16oz, 96 oz
Sea Shells	16oz
Ready Cut	16oz
Rotini Twists	16oz
Fettuccine	16oz
Ridge Mostaccioli	16oz, 96 oz.
Penne Rigate	16oz
Rotelle	16 oz.
Lasagne (smooth)	16 oz.
Reduced Carb Spaghetti/Penne	
Reduced Carb Spaghetti	12 oz.
Reduced Carb Elbows	12 oz.
Reduced Carb Penne	12 oz.
Reduced Carb Rotini	12 oz.
Reduced Carb Lasagne	16 oz.
Reduced Carb Variety Pack	
Reduced Carb Mixed Case	
Radiatore	500g
Back to Basics	

INTERROGATORY NO. 3

State the exact date on which Opposer will rely as the first date of use of Opposer's Mark in connection with the sale of each pasta item specified in Response to Interrogatory No. 2.

ANSWER

Opposer objects to this interrogatory as overly broad, unduly burdensome, and requiring the provision of information protected from disclosure as attorney work product. Notwithstanding the foregoing, and subject to supplementation as additional information is discovered, Opposer identifies the following information concerning the first known usages:

May 31, 1989 on promotional materials,

September, 1997 - on packaging for the goods.

INTERROGATORY NO. 4

Identify all documents, purchase orders, invoices, labels or any writing whatsoever which Opposer will rely upon to establish the date specified in response to Interrogatory No. 3.

ANSWER

Opposer objects to this interrogatory as overly broad, unduly burdensome, and requiring the provision of information protected from disclosure as attorney work product. Notwithstanding the foregoing, and subject to supplementation as additional information is discovered, Opposer identifies the following information concerning the first known usages:

Opposer's coupon with a May 31, 1989 expiration date; and

Mueller's Elbows package date stamped 1997.

INTERROGATORY NO. 5

State the exact date on which Opposer will rely as the first date of use of the term AMERICA'S FAVORITE in connection with the sale of each pasta item specified in Response to Interrogatory No. 2.

ANSWER

Opposer objects to this interrogatory as overly broad, unduly burdensome, and requiring the provision of information protected from disclosure as attorney work product. Notwithstanding the foregoing, Opposer identifies the following information concerning the first known usages of AMERICA'S FAVORITE by Opposer or its predecessors in interest. 1950's, use of AMERICA'S FAVORITE on Mueller's Elbows packaging, May 31, 1989, Coupon for Mueller's pasta using AMERICA'S FAVORITE PASTA; September 1997, Mueller's Elbows package using AMERICA'S FAVORITE PASTA.

INTERROGATORY NO. 6

Identify all documents, purchase orders, invoices, labels or any writing whatsoever which Opposer will rely upon to establish the date specified in response to Interrogatory No. 5.

ANSWER

Opposer objects to this Interrogatory as being overly broad and unduly burdensome, and requiring the provision of information protected from disclosure as attorney work product. Notwithstanding the foregoing, Opposer answers as follows: Recipe book from 1950's showing use of AMERICA'S FAVORITE on Mueller's Elbows packaging, coupon with expiration date of May 31, 1989 using AMERICA'S FAVORITE PASTA, MUELLER'S Elbows box date coded 1997 showing use of AMERICA'S FAVORITE PASTA on packaging.

INTERROGATORY NO. 7

With respect to each pasta item identified in response to Interrogatory No. 2, state:

(a) The manner in which Opposer's Mark is used, *e.g.*, by affixation to packaging, on labels, etc.;

(b) Whether AIPC itself ever manufactured the pasta item and, if not, the identity of the manufacturer;

(c) Whether the sale of the pasta item has been continuous from January 1, 1997 through the present;

(d) If the answer to subparagraph (c) is in the negative, state the periods of time for which the Opposer's Mark was not used.

ANSWER

Opposer objects to this interrogatory as overly broad and unduly burdensome, and not relevant to the present opposition proceeding. Notwithstanding the foregoing, Opposer answers as follows:

(a) On packaging and in advertising and promotional materials in connection with the goods;

(b) Yes;

(c) Yes;

(d) Irrelevant to the proceedings herein.

INTERROGATORY NO. 8

List all geographical areas (by city and/or state) in which each pasta item specified in response to Interrogatory No. 2 is distributed and/or sold under Opposer's Mark.

ANSWER

Opposer objects to this interrogatory as overly broad, unduly burdensome, and not relevant to this opposition proceeding. Notwithstanding the foregoing, Opposer advises that its pasta items sold under Opposer's Mark are sold throughout the United States, although distribution of its products under Opposer's Mark are primarily limited to military commissaries and mass merchandise stores in areas west of the Mississippi River.

INTERROGATORY NO. 9

Identify all media which AIPC or its license has utilized to advertise or promote each pasta item specified in response to Interrogatory No. 2.

ANSWER

Opposer objects to this interrogatory as overly broad, unduly burdensome, and not relevant to the present opposition proceedings. Notwithstanding the foregoing, and subject to supplementation, promotional use by Opposer and its predecessors in interest includes presentation on packaging, on coupons, television and radio advertising, and website advertising.

INTERROGATORY NO. 10

For each calendar year since 1997, state the amount expended by Opposer in connection with the advertising or promotion in the U.S. of each pasta item specified in response to Interrogatory No. 2 and sold under Opposer's Mark.

ANSWER

AIPC incorporates by references is General Objections. AIPC further objects to the extent that the interrogatory is irrelevant to the claims and defenses of the parties. AIPC objects that the

interrogatory seeks highly confidential business and commercial information. Subject to these and the general objections, and to the extent such information is available, AIPC will provide responsive and relevant information after entry of a suitable protective order.

INTERROGATORY NO. 11

For each calendar year since 1997, state the amount of sales (by dollar or volume), by Opposer or its licensee, of each item of pasta specified in response to Interrogatory No. 2, or item bearing Opposer's Mark.

ANSWER

AIPC incorporates by references is General Objections. AIPC further objects to the extent that the interrogatory is irrelevant to the claims and defenses of the parties. AIPC objects that the request seeks highly confidential business and commercial information. Subject to these and the general objections, AIPC will provide responsive and relevant information, to the extent available, after entry of a suitable protective order.

INTERROGATORY NO. 12

Identify by name and address all persons, organizations or agencies responsible for advertising each pasta item specified in response to Interrogatory No. 2 bearing Opposer's Mark.

ANSWER

Opposer objects to this interrogatory as overly broad, unduly burdensome, and not relevant to the present opposition proceedings, and requesting confidential commercial information. Notwithstanding the foregoing, Opposer identifies the advertising agencies of Barkley & Evergreen,

432 W. 8th Street, Kansas City, Missouri 64105, and PowerPact LLC, 2902 Polo Parkway, Midlothian, VA 23113, who have assisted Opposer in developing advertising for the pasta products sold under Opposer's mark.

INTERROGATORY NO. 13

State all facts that support the claim that the Mueller's Brand is "AMERICA'S FAVORITE PASTA" and identify any documents sufficient to support such facts.

ANSWER

Opposer objects to this interrogatory as incorrectly assuming that Opposer is making a factual claim. Opposer is not making a factual claim regarding its trademark AMERICA'S FAVORITE PASTA. Opposer's use of AMERICA'S FAVORITE PASTA is an opinion. See Opposer's packaging and the decision of the 8th Circuit Court of Appeals in American Italian Pasta Company v. New World Pasta Company. Opposer's opinion and use of the trademark AMERICA'S FAVORITE PASTA is based on the long brand heritage of the Mueller's pasta products, its made in America quality, its family tradition of use. *(Webster Declaration of 13 Nov 2002, paragraph 19)*

INTERROGATORY NO. 14

State all facts that support your allegation that Barilla filed its application for the mark BARILLA - AMERICA'S FAVORITE PASTA "with notice and knowledge of the prior rights and use of Opposer's AMERICA'S FAVORITE PASTA Marks in connection with pasta products" and identify any documents sufficient to support such facts.

ANSWER

Objections: overly broad, unduly burdensome, attorney-client and work product. Subject to those objections, Opposer anticipates the development of additional facts concerning Applicant's

knowledge during the course of discovery. At present, Opposer identifies the packaging of Opposer's pasta products and its advertising and promotional materials bearing the mark in response to this interrogatory.

INTERROGATORY NO. 15

State the earliest date that Opposer was aware of Barilla's intent-to-use BARILLA - AMERICA'S FAVORITE PASTA in connection with pasta products.

ANSWER

Opposer objects to this interrogatory as calling for the provision of information privileged from discovery by the attorney-client privilege and as attorney work product. Subject to the foregoing, Opposer was aware of the intent-to-use application of Applicant for BARILLA - AMERICA'S FAVORITE PASTA on November 13, 2002.

INTERROGATORY NO. 16

Identify all persons who participated in any way in the preparation of the answers or responses to these Interrogatories and state specifically, with reference to Interrogatory numbers, the area of participation of each such person.

ANSWER

Other than assistance provided to Opposer by Opposer's counsel and staff, Drew Lericos.

VERIFICATION

STATE OF _____)
) ss.
COUNTY OF _____)

Dan Trott hereby certifies that he is Executive Vice President Sales & Marketing of Opposer, and that he understands that he is answering these interrogatories on behalf of Opposer, and that the answers given to the above and foregoing interrogatories are true and correct to the best of his knowledge and belief.

Dated: 10/14/04

DAN TROTT

The foregoing Responses to Interrogatories were subscribed and sworn to before me this _____ day of _____, 2004

Notary Public

My Commission Expires:

_____

AS TO THE OBJECTIONS:

Dated: October 14, 2004

Respectfully submitted,

Thomas H. Van Hoozer Reg No. 32,761
HOVEY WILLIAMS LLP
2405 Grand Boulevard, Suite 400
Kansas City, Missouri 64108
Telephone: (816) 474-9050
Facsimile: (816) 474-9057

CERTIFICATE OF SERVICE

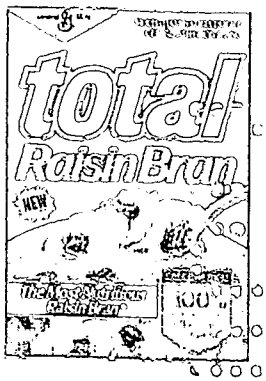
I hereby certify that on the 14th day of October, 2004, I served the foregoing OPPOSER'S ANSWERS TO APPLICANT'S FIRST SET OF INTERROGATORIES by causing a true copy thereof to be sent via first class, postage paid, to the following:

G. Franklin Rothwell
Robert H. Cameron
ROTHWELL, FIGG, ERNST & MANBECK P.C.
1425 K Street, NW, Suite 800
Washington, DC 20005

Thomas H. Van Hoozer

Exhibit 3

MFR COUPON EXPIRES 6/4/89 $769



Save 50¢

The most nutritious Raisin Bran

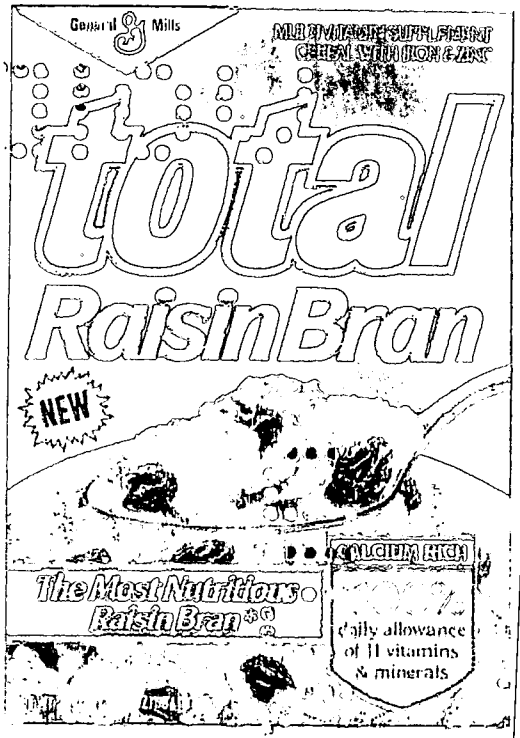
RETAILER: General Mills will reimburse you for the face value of this coupon plus 8¢ if submitted in compliance with our redemption policy. Copies available upon request. Void if copied, prohibited or regulated. Cash value 1/100 cent. Send to GMI COUPON REDEMPTION, Box 900, MPLS., MN 55460 or an authorized clearinghouse.

ONE COUPON PER PURCHASE—Good only in USA, APO's & FPO's.

General Mills

[redacted]

9 16000 73550 2



total® nutrition has finally come to raisin bran

New *total Raisin Bran* has 100% daily allowance of 11 vitamins and minerals.

A54915

Best Foods, CPC International Inc.

A 01429

MFG. COUPON | EXPIRES MAY 31, 1989

25¢ ON 3

SAVE 25¢

on Any THREE 8 oz. Mueller's® Packages

25 ON

17710

CONSUMER: Limit one coupon per purchase and you may pay all applicable sales taxes. Void where prohibited, taxed or otherwise restricted. Cash value 1/100¢.

RETAILER: Best Foods will reimburse you the face value of this coupon plus 8¢ if submitted in full compliance with the Best Foods Redemption Policy. Send coupons for

Mueller's elbows ENRICHED MACARONI

922163

[redacted]

Save 25¢ on Mueller's. America's Favorite Pasta!

Exhibit 4

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

AMERICAN ITALIAN PASTA COMPANY,	)	
Opposer,	)	
v.	)	Opposition No. 91-161,373
BARILLA G. E R. FRATELLI-SOCIETA PER AZIONI,	)	
Applicant.	)	

DECLARATION OF TIMOTHY S. WEBSTER IN OPPOSITION TO APPLICANT'S MOTION FOR SUMMARY JUDGMENT

I, Timothy S. Webster, declare and state as follows:

1. I served as President and Chief Executive Officer of American Italian Pasta Company (AIPC) from 1997 to early December of 2005, and continue to provide certain consultative services to AIPC. My further background with AIPC is outlined in my Affidavit of Timothy S. Webster of November 13, 2002 submitted in Opposition to New World Pasta's Motion for Partial Summary Judgment submitted in Civil Action No. 02 0594 CV-W-SOW, a copy of which is appended hereto as Exhibit A and incorporated herein. For completeness, also attached as Exhibit B and incorporated herein is my Supplemental Affidavit of Timothy Webster of January 9, 2003 made in the same case.

2. I have been asked by AIPC to provide this Declaration in support of its Opposition to the motion for summary judgment submitted by Barilla in the above-captioned opposition proceeding in order to submit and expand on the information provided in my earlier affidavits attached as Exhibits A and B.

3. At the time AIPC entered into an agreement to become the exclusive manufacturer of pasta for Best Foods, Best Foods was already using the slogan "America's Favorite Pasta" on its packaging for the Mueller's pasta products. While I do not know the exact date when Best Foods first introduced this slogan, I do know that it was before we began the manufacturing and packaging for the Mueller's line of pasta in 1997. We subsequently acquired the intellectual property rights to the Mueller's brand as a result of our October 4, 2000 Asset Purchase Agreement with Best Foods, and this included the slogan "America's Favorite Pasta" as a component of the intellectual property. Thus, based on my personal knowledge of Best Foods use, I believe that the usage of the slogan "America's Favorite Pasta" and AIPC's rights thereto go back to at least as early as 1997.

4. In paragraphs 8 through 11, 13 and 15 of my November 13, 2002 affidavit appended as Exhibit A, I refer to some of the Mueller's brand history and our marketing approach which incorporated the slogan "America's Favorite Pasta." In paragraphs 16 and 17 of Exhibit A I address the question of geographic scope of usage and contest the assertion that the use of "America's Favorite Pasta" by AIPC has constituted false and misleading advertising.

5. I retain these positions in this Declaration. It was my position that AIPC's use of this phrase was not a false and misleading statement of fact, but rather, as found by the Distsrict Court and affirmed by the 8th Circuit Court of Appeals, that in the context of a claim for false advertising, the slogan "America's Favorite Pasta" was puffery. This position is not, from a manufacturer's marketing standpoint, inconsistent with the establishment of this slogan with AIPC in general or more specifically to the Mueller's brand. It was, in fact, AIPC's intention to continue the use of the slogan first started by

Best Foods in order establish the connection between the slogan "America's Favorite Pasta" and the Mueller's brand in the same way that other companies have used slogan's to establish a connection with their main brand. While at AIPC, I believed that association had been in large part established as part of the overall brand image as reflected by the statements set forth in paragraphs 8, 10, 11 and 13 of Exhibit A.

6. During my tenure at AIPC while we owned the Mueller's brand, we had several marketing sessions where the Mueller's packaging was reviewed and consideration was given to dropping the slogan. Throughout these reviews, we not only chose to retain the slogan "America's Favorite Pasta" for Mueller's core line of pasta products, but to resume its use throughout the product line after seeing the results of the use of Mueller's Pasta LaBella in the 2001 time frame. This reflects our assessment that the slogan had been established to the pasta consumer as a recognizable and important part of the branding statement for Mueller's pasta.

The undersigned, Timothy S. Webster, declares that all statements made herein are true; that all statements made herein of his own knowledge are true and that all statements made on information and believe are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code and that such willful false statements may jeopardize the validity of the document.

TIMOTHY S. WEBSTER

T.S. Webster

Date: 3/3/06

IN THE UNITED STATES DISTRICT COURT
FOR THE WESTERN DISTRICT OF MISSOURI
WESTERN DIVISION

AMERICAN ITALIAN PASTA COMPANY	)	
	)	
Plaintiff,	)	
	)	
v.	)	Civil Action No.
	)	02 0594 CV-W-SOW
NEW WORLD PASTA COMPANY	)	
	)	
Defendant.	)	

SUPPLEMENTAL AFFIDAVIT OF TIMOTHY WEBSTER

STATE OF MISSOURI)
) ss.:
COUNTY OF CLAY)

Timothy S. Webster being duly sworn, deposes and says:

1. I have read the motion to strike portions of my affidavit dated November 13, 2002 submitted in opposition to New World Pasta's motion for partial summary judgment. I offer no view with legal arguments on "relevance" made by counsel for NWP. However, to the extent that there is any challenge to my affidavit based upon any lack of personal knowledge, I offer this affidavit.

2. As President and Chief Executive Officer, I am in charge of the entire operations of American Italian Pasta Company, Inc. ("AIPC"). I have personal knowledge of the marketing of dry pasta products because of my review of documents maintained in the ordinary course of

EXHIBIT
B

Evergreen, here in Kansas City is attached as Exhibits A, B and C. These were collected and maintained in the ordinary course of business.

9. The challenge to the facts stated in paragraph 12 of my First Affidavit are "relevance" and not a challenge to my personal knowledge.

10. Paragraphs 13-15 of my First Affidavit are challenged as "conclusions and inadmissible hearsay unsupported by any competent admissible evidence." The factual statements I made in these paragraphs are based upon my personal knowledge of our marketing strategy (¶13), market and sales conditions in the industry (¶14) and the marketing strategy behind our 2002 relaunch of the MUELLER'S brand (¶15). I have personal knowledge of all these facts in ¶13 based upon my review of our market research which identified consumer attitudes to the MUELLER'S brand. Excerpts from the market research reports are attached as Exhibits A, B and C. My knowledge of the market conditions as identified in ¶14 are based upon AIPC's analysis of Nielsen data which is available to the public for a fee. The pricing information is based upon my own personal knowledge of the market and has been referenced by financial analysts who cover the industry. Further, the statements in ¶15 are based upon my personal knowledge of the marketing strategy we are executing for the MUELLER'S brand.

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12. NWP seeks to strike the first two sentences of paragraph 17 of my First Affidavit as "conclusions and inadmissible hearsay unsupported by any competent evidence." These

statements set forth my view that NWP's false advertising claims against AIPC are not based upon any statements or actions by AIPC in which AIPC claims that MUELLER'S is "Number 1" in sales. We make no such claims. I point out these are facts to call into question the factual basis of the false advertising claim made by NWP, one of our competitors in the industry, against AIPC.

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T. S. Webster

Timothy S. Webster

Sworn to before me this 9th
day of January, 2003

Kerri J. Jones

NOTARY PUBLIC

KERRI J. JONES
Notary Public - Notary Seal
STATE OF MISSOURI
Jackson County
My Commission Expires: Jan. 11, 2004

IN THE UNITED STATES DISTRICT COURT
FOR THE WESTERN DISTRICT OF MISSOURI
WESTERN DIVISION

AMERICAN ITALIAN PASTA COMPANY,	)	
	)	
Plaintiff,	)	
	)	
v.	)	Civil Action No. 02-0594-CV-W-SOW
	)	
NEW WORLD PASTA COMPANY,	)	
	)	
Defendant.	)	

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Respectfully submitted,

HOVEY WILLIAMS LLP

Dated: Jan 10, 2003

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Robert D. Hovey, MO Bar # 15,831
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William R. Hansen
Duane Morris LLP
380 Lexington Avenue
New York, New York 10168
(212) 692-1011 (phone)
(212) 692-1020 (fax)

ATTORNEYS FOR PLAINTIFF

CERTIFICATE OF SERVICE

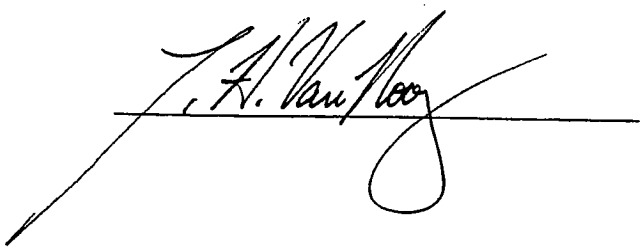
The undersigned hereby certifies that on the 10th day of January, 2003, I electronically filed the foregoing with the Clerk of the Court, Western District of Missouri using the CM/ECF system which sent notification of such filing to the following:

Brent Coverdale (bcoverdale@shb.com)
Shook, Hardy & Bacon L.L.P.
One Kansas City Place
1200 Main Street
Kansas City, MO 64105-2118,

Forrest A. Hainline III (aikidolaw@aol.com)
Suite 440, 5335 Wisconsin Avenue, N.W.
Washington, D.C. 20015

and I hereby certify that I forwarded the foregoing to the following non CM/ECF participant by electronic mail:

Raymond Sweigart (rsweigart@pillsburywinthrop.com)
Pillsbury Winthrop LLP
1600 Tysons Blvd.
McLean, Virginia 22102



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FOR THE WESTERN DISTRICT OF MISSOURI
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Plaintiff,	)	
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	)	
NEW WORLD PASTA COMPANY,	)	
	)	
Defendant.	)	

EXHIBITS A-C TO SUPPLEMENTAL AFFIDAVIT OF TIMOTHY WEBSTER

'CONFIDENTIAL - FILED UNDER SEAL"

This envelope is filed in this case by Plaintiff, American Italian Pasta Company, for the exclusive use of the Court and is not to be opened nor the contents thereof revealed to anyone other than authorized representatives of the Court of the parties except by prior order of the Court.

COPY

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IN THE UNITED STATES DISTRICT COURT
FOR THE WESTERN DISTRICT OF MISSOURI
WESTERN DIVISION

AMERICAN ITALIAN PASTA COMPANY	)	
	)	
Plaintiff,	)	
	)	
v.	)	Civil Action No.
	)	02 0594 CV-W-SOW
NEW WORLD PASTA COMPANY	)	
	)	
Defendant.	)	

SUPPLEMENTAL AFFIDAVIT OF TIMOTHY WEBSTER

STATE OF MISSOURI)
) ss.:
COUNTY OF CLAY)

Timothy S. Webster being duly sworn, deposes and says:

1. I have read the motion to strike portions of my affidavit dated November 13, 2002 submitted in opposition to New World Pasta's motion for partial summary judgment. I offer no view with legal arguments on "relevance" made by counsel for NWP. However, to the extent that there is any challenge to my affidavit based upon any lack of personal knowledge, I offer this affidavit.

2. As President and Chief Executive Officer, I am in charge of the entire operations of American Italian Pasta Company, Inc. ("AIPC"). I have personal knowledge of the marketing of dry pasta products because of my review of documents maintained in the ordinary course of

EXHIBIT
B

business by AIPC and my review of third party reports, personal inspections of retail outlets, discussions with customers, financial analysts and the media.

3. My statements in Paragraph 2 of my First Affidavit are based upon my personal knowledge of our segment of the food industry. The information set forth in Exhibit A, our annual report for the year 2001, provides the publicly stated basis for my testimony. It is incredible that NWP argues that they are not competitors of AIPC.

4. Paragraph 3 of my First Affidavit explains to the Court the factual basis for AIPC's decision to file a declaratory judgment action. As the person making the decision, my factual statement of the reasons are based upon my personal knowledge.

5. I do not know what a "generality" is in the criticized look at the factual statements in Paragraph 5 of my First Affidavit. My testimony is based upon my personal knowledge of AIPC's role as exclusive manufacturer of MUELLER'S products in the years 1997-2000, a period in which I was the CEO of AIPC.

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T. S. Webster

Timothy S. Webster

Sworn to before me this 9th
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Kerri J. Jones

NOTARY PUBLIC

KERRI J. JONES
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STATE OF MISSOURI
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My Commission Expires: Jan. 11, 2004

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FOR THE WESTERN DISTRICT OF MISSOURI
WESTERN DIVISION

AMERICAN ITALIAN PASTA COMPANY,	)	
	)	
Plaintiff,	)	
	)	
v.	)	Civil Action No. 02-0594-CV-W-SOW
	)	
NEW WORLD PASTA COMPANY,	)	
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Respectfully submitted,

HOVEY WILLIAMS LLP

Dated: Jan 10, 2003

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Suite 440, 5335 Wisconsin Avenue, N.W.
Washington, D.C. 20015

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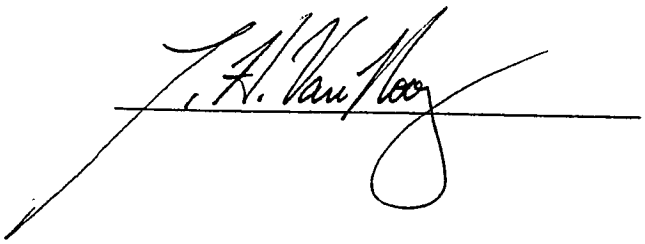
Raymond Sweigart (rsweigart@pillsburywinthrop.com)
Pillsbury Winthrop LLP
1600 Tysons Blvd.
McLean, Virginia 22102



IN THE UNITED STATES DISTRICT COURT
FOR THE WESTERN DISTRICT OF MISSOURI
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AMERICAN ITALIAN PASTA COMPANY,	)	
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NEW WORLD PASTA COMPANY,	)	
	)	
Defendant.	)	

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'CONFIDENTIAL - FILED UNDER SEAL"

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ATTORNEYS FOR PLAINTIFF

Exhibit 5

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

AMERICAN ITALIAN PASTA COMPANY	)	**OPPOSITION NO.: 91-161,373**
	)	**SERIAL NO.:**
Opposer,	)	**MARK:**
	)	
v.	)	
	)	
BARILLA G. E R. FRATELLI-SOCIETA PER AZIONI,	)	
	)	
	)	
Applicant.	)	

DECLARATION OF ERIC JOHNSON

I, Eric Johnson, declare:

1. I am the Vice President of Supply Chain Planning at American Italian Pasta Company ("AIPC"), and am submitting this declaration in support of AIPC's Brief in Opposition to Applicant's Motion for Partial Summary Judgment, And, In the Alternative, Motion to Reopen.. I have held this position since 2005. My responsibilities include operations, technical support, engineering and capacity planning. I am also involved with the manufacturing of Mueller's pasta products.

2. I have been employed by AIPC since 1991 and have held various management positions with the company involving maintenance and engineering.

3. In 1997, AIPC began co-packing Mueller's pasta products for Bestfoods. During that time, I was involved with engineering management and oversaw the production of packaging for the Mueller's products.

4. In order to meet capacity, AIPC expanded our existing facility in Columbia, South Carolina to provide additional capacity to produce and pack Mueller's pasta products. Attached as Exhibit A is a copy of the packaging that Bestfoods was using at the time it asked AIPC to begin producing the packaging.

5. When AIPC began producing the Mueller's packaging, certain changes had to be made to the shape and size of the cartons in order to work with AIPC's machines. AIPC did not, however, make any changes to the artwork or text on the cartons. Attached as Exhibit B is the first version of the cartons produced by AIPC.

6. At the time AIPC began producing the packaging for and packing the Mueller's products, the Mueller's packaging prominently displayed "AMERICA'S FAVORITE PASTA" on the front of the cartons.

7. After AIPC purchased the Muellers' product line from Best Foods/Unilever, AIPC continued to prominently display "AMERICA'S FAVORITE PASTA" on the front of the cartons.

8. Attached as Exhibit C are copies of the packaging throughout the years AIPC has produced them. Each copy is identified by year of production. Each of these cartons prominently display AMERICA'S FAVORITE PASTA. The following chart explains the dates in which the packaging changed, as identified by the box numbers (and Bates Numbers).

SKU 2001	Description	1997	1999	MAR 2001	SEP 2001	2002	2003	2003
620122	Spaghetti-16 oz	400451 (A05018)		401271 (A05019)	401357 (A05020) (A05034) (A05064) (A05065)	401668 (A05021)	401855 (A05022) (A05066) (A05067)	
620126	Elbows-16 oz.	400467 (A05023) (A05072)	400960 (A05060)	401298 (A05024)	401361 (A05025) (A05039)		401733 (A05026)	401862 (A05027) (A05040)
620123	Spaghetti-32 oz.	400457 (A05010)			401358 (A05012) (A05035)	401669 (A05013)	401857 (A05014)	
620130	Ready Cut-16 oz.	400469 (A05015)			401365 (A05016) (A05042)		401861 (A05017)	
640477	Ruffles/Radiatore					401630		

9. At one point, AIPC changed the packaging on some of its Mueller's brand pasta under the Pasta Labella label, which did not retain the slogan AMERICA'S FAVORITE PASTA, a copy of which is attached as Exhibit D. After less than one year, AIPC changed the packaging again to omit the Pasta Labella trademark and re-added the slogan AMERICA'S FAVORITE PASTA. Nonetheless, AIPC always displayed AMERICA'S FAVORITE PASTA on the packages of its core products, such as spaghetti and macaroni.

10. In other words, since 1997, when AIPC first began producing the packaging for Mueller's pasta products, "AMERICA'S FAVORITE PASTA" has continuously been prominently displayed on the front of the Mueller's cartons.

11. Approximately ninety percent (90%) of the Mueller's pasta products are distributed to the states East of the Mississippi River. The other ten percent (10%) are distributed and sold through military commissaries and to large discount stores, such as Big Lots and Dollar General. These military commissaries and large discount stores are located throughout the United States.

12. Since 1997, I estimate that AIPC has distributed 950 million packages of Mueller's pasta products bearing the trademark "AMERICA'S FAVORITE PASTA" throughout the United States.

I declare under penalty of perjury under the laws of Texas that the foregoing is true and correct.

Dated: 3 - 3 - 2006

Eric Johnson

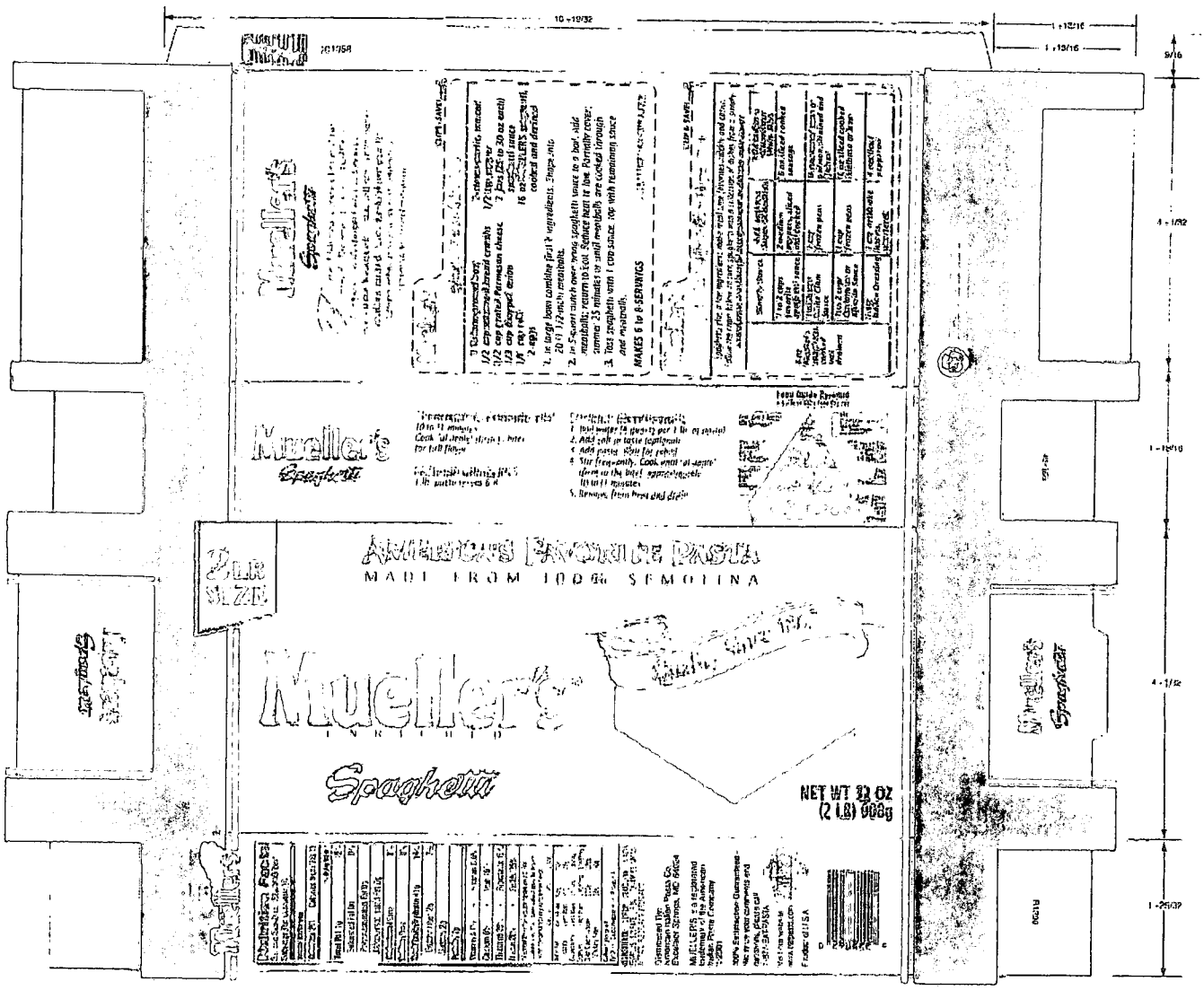

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EXHIBIT
A

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R0997

Mueller's®
TWISTS

A CHOLESTEROL FREE
SODIUM FREE FOOD

AMERICA'S FAVORITE PASTA
MADE FROM 100% SEMOLINA

Mueller's®
ENRICHED MACARONI PRODUCT

Quality Since 1867 ©

TWISTS

Nutrition Facts

Serving Size 2 oz dry (56g/about 3/4 cup)
Servings Per Package 8

Amount Per Serving	
Calories 210	Calories from Fat 10
	% Daily Value*
Total Fat 1g	2%
Saturated Fat 0g	0%
Polyunsaturated Fat 0.5g	
Monounsaturated Fat 0g	
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 42g	14%
Dietary Fiber 1g	4%
Sugars 2g	
Protein 7g	6%

Vitamin A 0%	•	Vitamin C 0%
Calcium 0%	•	Iron 10%
Thiamin 35%	•	Riboflavin 15%
Niacin 15%	•	Folic Acid 30%

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g
Protein		50g	65g

INGREDIENTS: DURUM WHEAT SEMOLINA, ENRICHED WITH B VITAMINS (NIACIN, THIAMIN MONONITRATE, RIBOFLAVIN, FOLIC ACID) AND IRON (FERROUS SULFATE).

NET WT 16 OZ (1 LB) 454g

Distributed By:
Best Foods Division
CPC International Inc.
Englewood Cliffs, NJ
07632-9976

Mueller's®
TWISTS

[redacted]

EXHIBIT
B

400470

Mueller's®

For over 130 years, pasta lovers have enjoyed the great taste of Mueller's®. Mueller's® cooks to perfect tenderness every time because it's made from 100% pure semolina milled from the highest quality durum wheat. Taste why Mueller's® is America's favorite pasta!

Low Fat

CAESAR PASTA SALAD

- 1/2 cup Hellmann's® low fat mayonnaise dressing or light or real mayonnaise
- 1/4 cup grated Parmesan cheese
- 1/4 cup lowfat milk
- 2 Tbsp lemon juice
- 2 cloves garlic, minced
- 1 medium head romaine lettuce, cut crosswise into 1/2-inch wide strips (8 cups loosely packed)
- 1 lb boneless, skinless chicken breast, cooked and thinly sliced
- 8 oz MUELLER'S twists (about 3 cups), cooked, rinsed with cold water and drained
- Freshly ground pepper

1. In large bowl combine first 5 ingredients.
2. Add lettuce, chicken and twists; toss to coat. Season to taste with freshly ground pepper.

MAKES ABOUT 10 (1 cup) MAIN DISH SERVINGS **PREP TIME: 15 MINUTES**

Nutrition Information Per Serving: *190 Calories, 30 Calories From Fat, 3g Total Fat, 1g Saturated Fat, 40mg Cholesterol, 170mg Sodium, 21g Total Carbohydrate, 1g Fiber, 18g Protein.*

TIP: In step 1, substitute 3/4 cup bottled creamy Caesar or Ranch dressing for first 5 ingredients.

Low Fat

PASTA WITH A TWIST

- 1 1/4 cups water
- 2 chicken bouillon cubes
- 1 Tbsp Argo® corn starch
- 2 Tbsp margarine
- 2 medium carrots, cut into thin strips
- 1 medium red pepper, cut into thin strips
- 1 large onion, chopped
- 1 cup sliced mushrooms (about 4 oz)
- 1 large clove garlic, minced
- 2 tsp dried basil
- 1/8 tsp crushed red pepper (optional)
- 2 Tbsp lemon juice
- 8 oz MUELLER'S twists (about 3 cups), cooked and drained

1. In small bowl stir water, bouillon and corn starch until blended; set aside.
2. In large skillet melt margarine over medium-high heat. Add carrots; stirring occasionally, cook 2 minutes. Add red pepper, onion, mushrooms, garlic, basil and crushed red pepper; cook, stirring, 3 minutes.
3. Stir corn starch mixture and pour into skillet. Stirring constantly, bring to a boil over medium heat and boil 1 minute. Stir in lemon juice. Toss with twists.

MAKES 4 MAIN DISH SERVINGS **PREP TIME: 20 MINUTES**

Nutrition Information Per Serving: *300 Calories, 60 Calories From Fat, 7g Total Fat, 1g Saturated Fat, 0mg Cholesterol, 440mg Sodium, 50g Total Carbohydrate, 4g Fiber, 9g Protein.*

CARTON MADE FROM 100% RECYCLED PAPERBOARD MINIMUM 35% POST-CONSUMER CONTENT

Mueller's®

COOKTIME: 6 TO 8 MINUTES

Servings	Uncooked (Cups)	Water (Quarts)	Cooked (Cups)
2	1 1/2	3	1 3/4
4	3	4	3 1/2
6	4 1/2	4-6	5 1/4
8	1 pkg	6	7

COOKING DIRECTIONS

1. Bring water to a rapid boil. Add salt (1 to 2 tsp), if desired.
2. Add twists, stirring to separate; return to boil.
3. Cook uncovered, stirring occasionally, 6 to 8 minutes or until desired tenderness.
4. Drain. Serve immediately.

TIPS

- Reduce cook time slightly when using in a recipe that requires further cooking.
- If using in a salad, rinse immediately with cold water; drain.

Quality of BEST FOODS products is guaranteed. We value your comments and questions, please call **1-800-338-8831**.

CPC International®

Product of U.S.A.
MU-00217-CT-04

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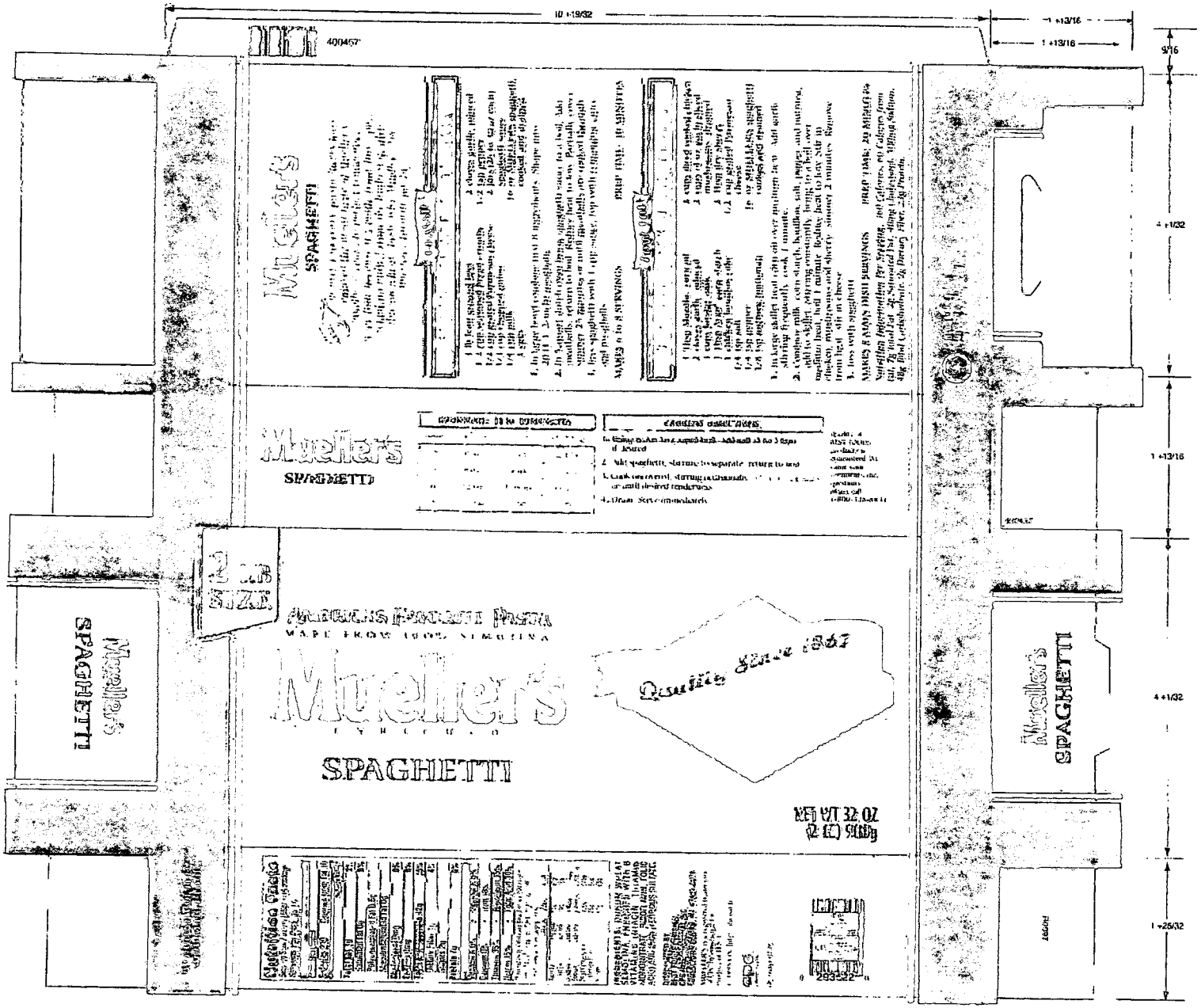
3392


Mueller's
SPAGHETTI
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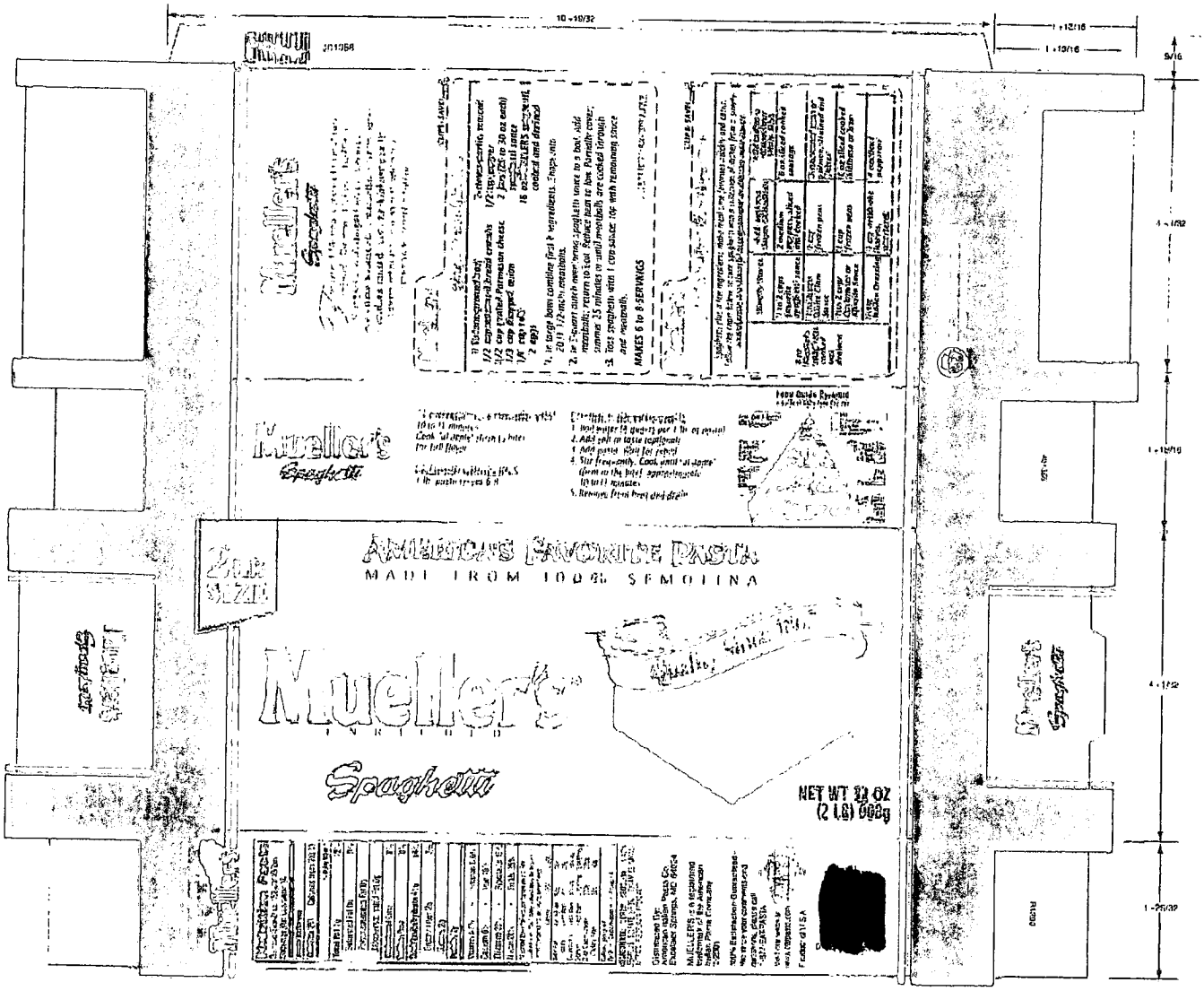
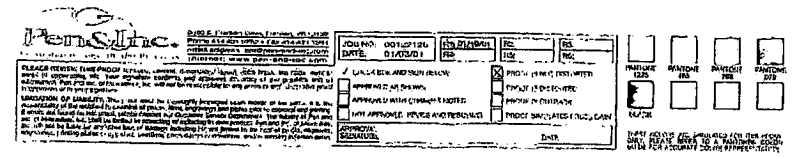
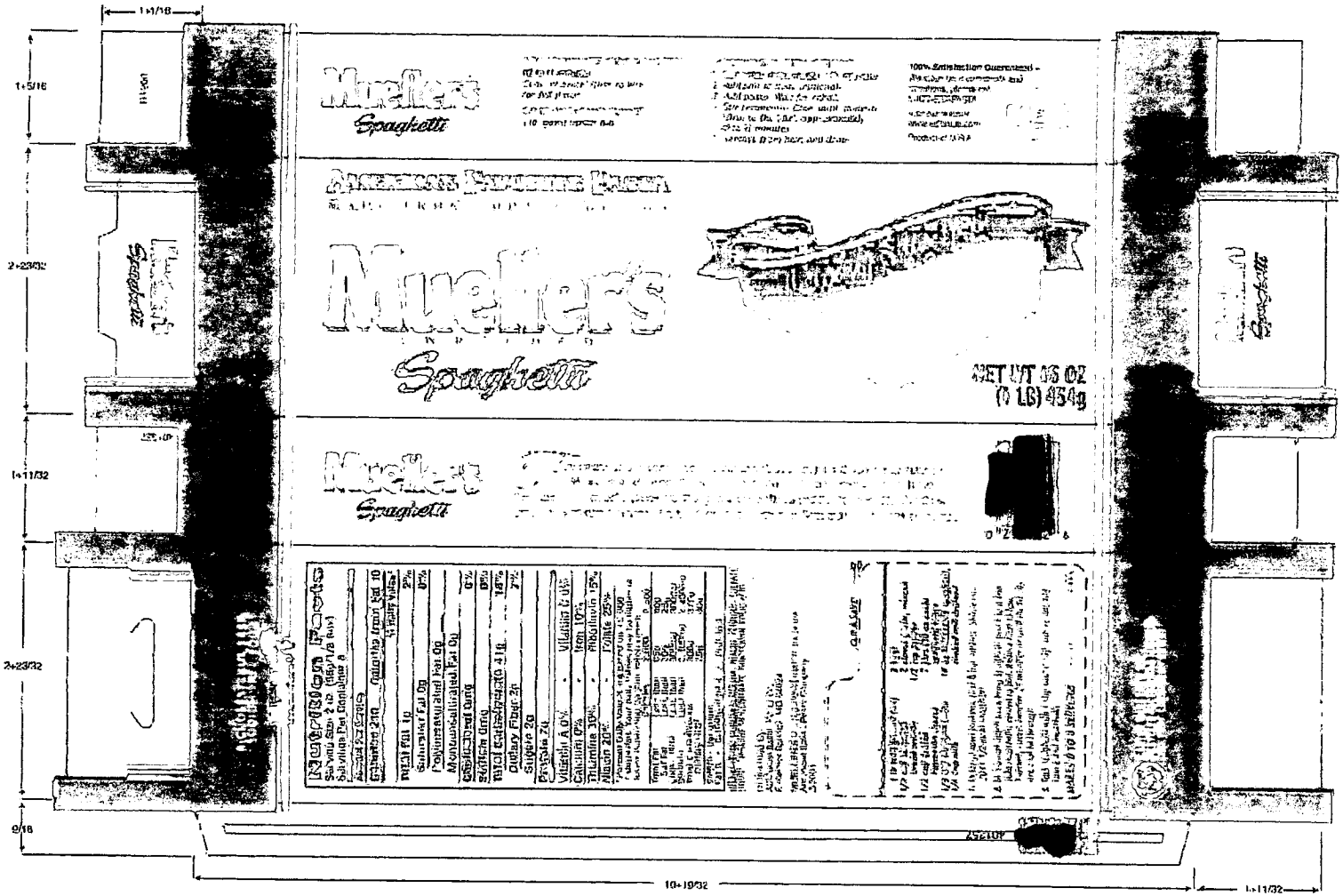
SPAGHETTI
Mueller's
SPAGHETTI
Mueller's
SPAGHETTI
Mueller's
SPAGHETTI
Quality Since 1867
2 LB SIZE
10 +19/32
1 +13/16
1 +13/16
9/16
4 +1/32
1 +13/16
4 +1/32
1 +25/32

EXHIBIT

C


AMERICA'S FAVORITE PASTA
MADE FROM 100% SEMOLINA
Mueller's
Spaghetti
NET WT 32 OZ
(2 LB) 908g





PENNSYLVANIA INC.

JOB NO: 00132129 | DATE 01/05/01 | R1: 01/30/01 | R2: | R3: | R4: | R5: | R6:

✓ CHECK BOX AND SIGN BELOW

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- [ ] APPROVED WITH CHANGES NOTED
- [ ] NOT APPROVED REVISE AND RESUBMIT
- [x] PROOF IS NOT DISTORTED
- [ ] PROOF IS DISTORTED
- [ ] PROOF IS OUTBACK
- [ ] PROOF SHOULD BE SPREAD GAIN

APPROVAL SIGNATURE | DATE

PANTONE 223 | PANTONE 485 | PANTONE 208 | PANTONE 312 | BLACK

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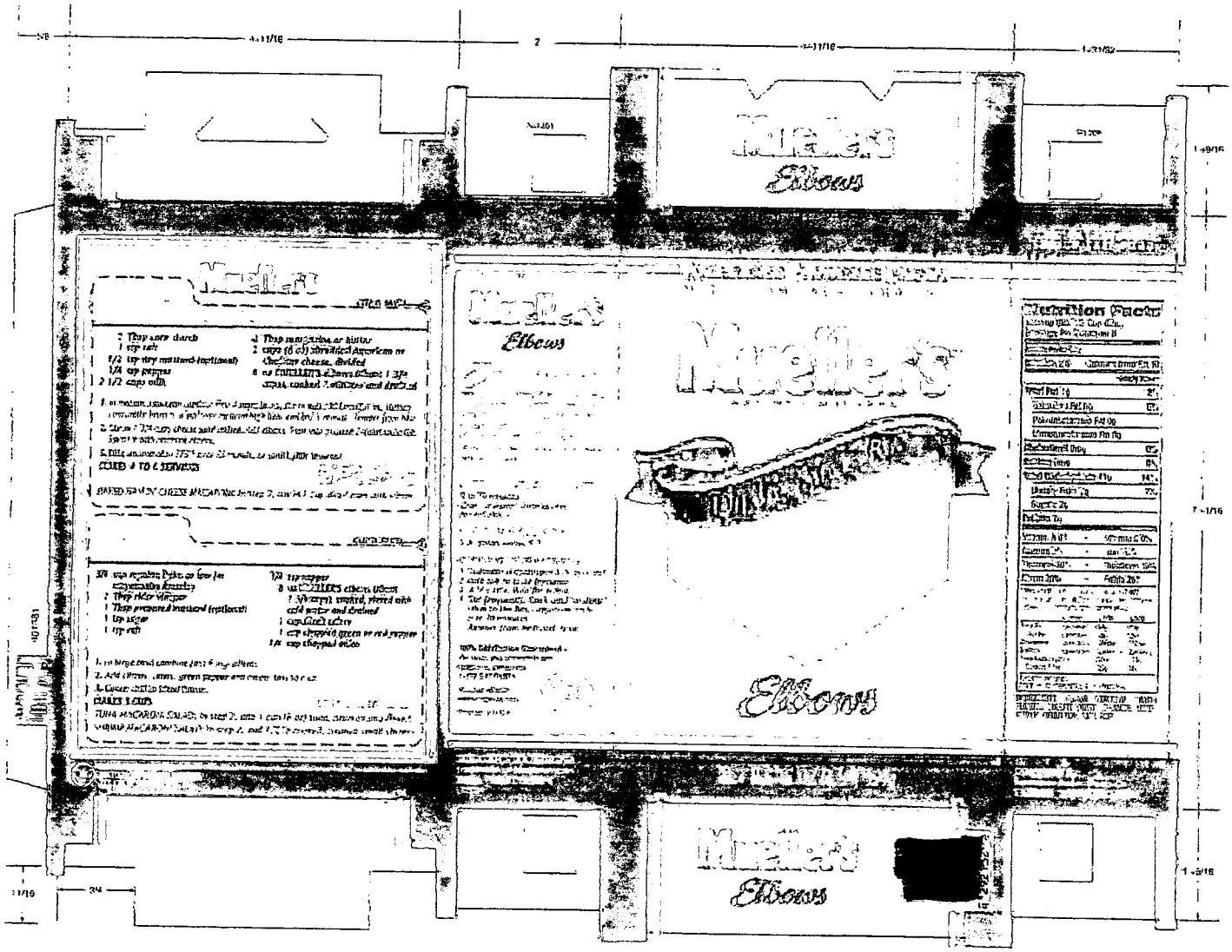
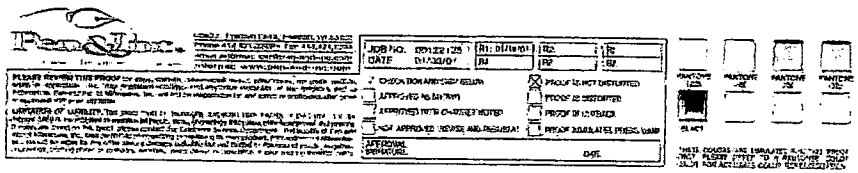
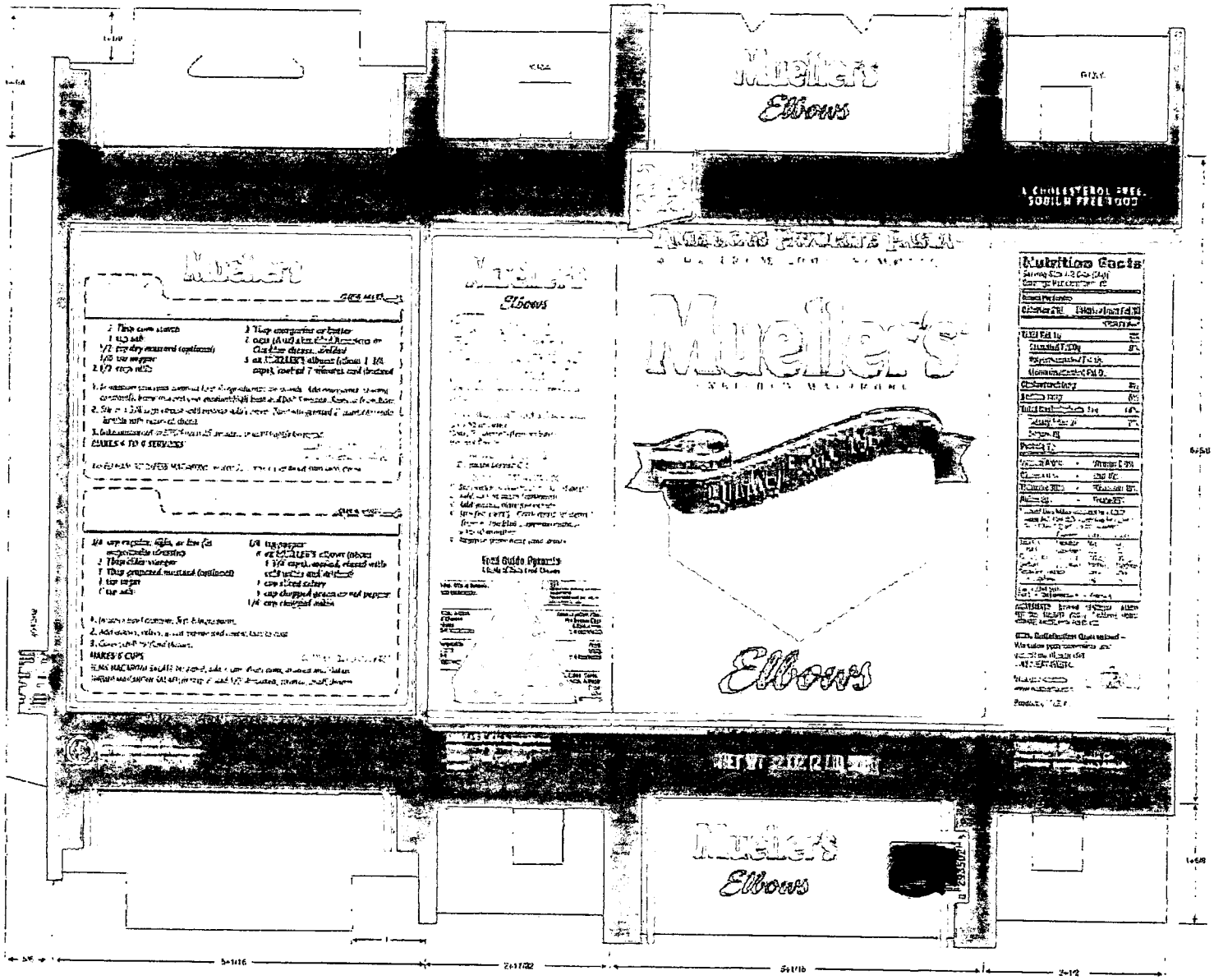
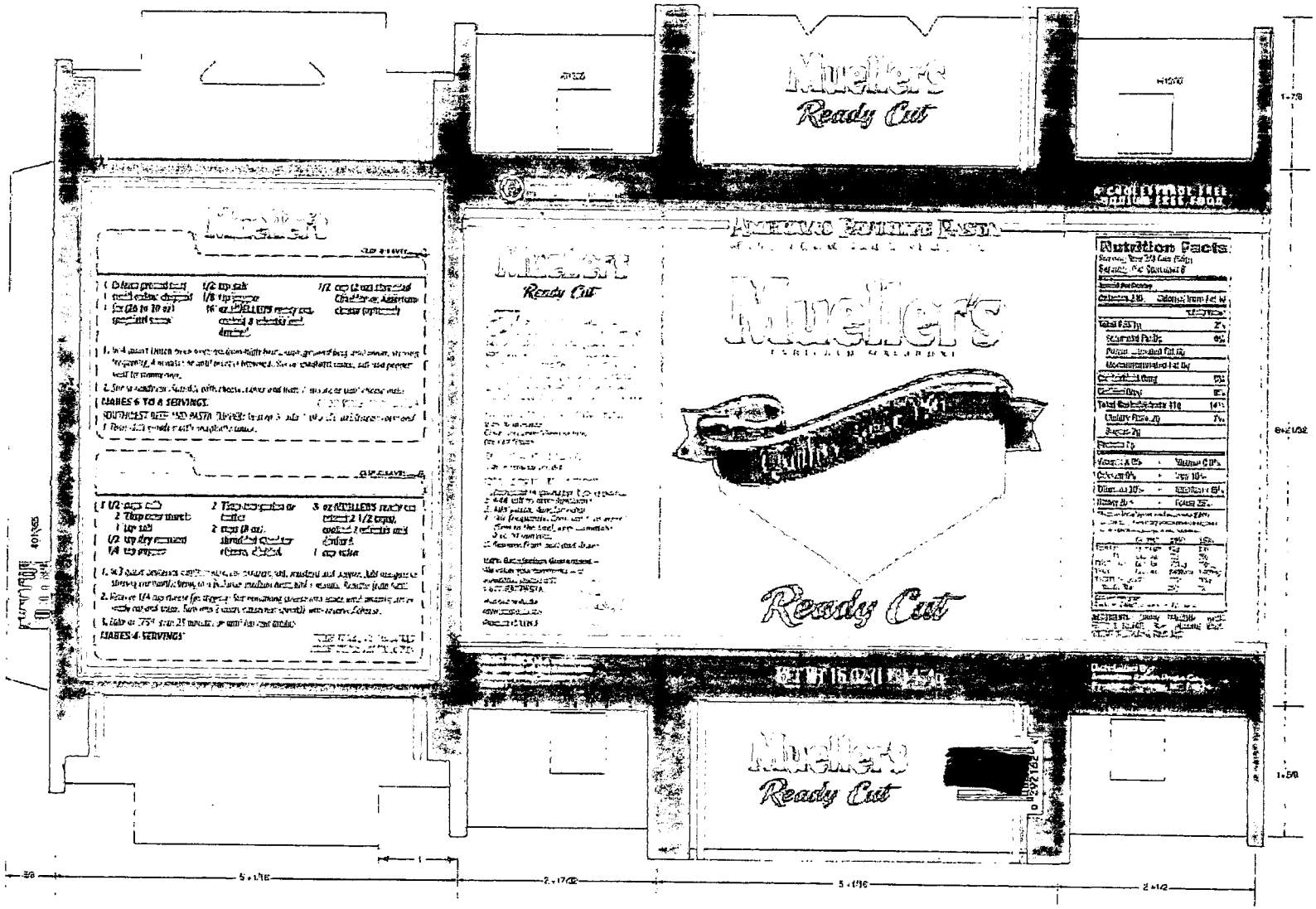
A05034

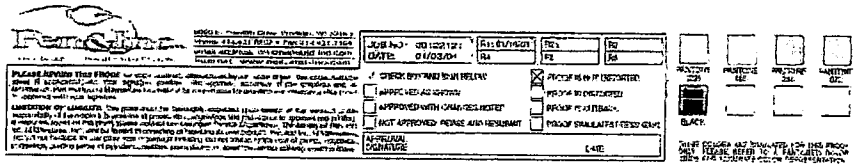
Spaghetti
NET WT 32 OZ
(2 LB) 908g


Elbows
Elbows
Elbows
Elbows
Nutrition Facts




Mueller's
Elbows
Nutrition Facts
Food Guide Pyramid
MAKES 6 CUPS


Mueller's
Ready Cut
Nutrition Facts
Mueller's
Ready Cut
Mueller's
Ready Cut
MAKES 6 TO A SERVING.
MAKES 4 SERVINGS
5 1/16
2 1/16
5 1/16
2 1/2
1 5/8
6 1/2 1/32
1 7/8
1 1/8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PLEASE REVIEW THIS PROOF
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NOT APPROVED REVISE AND RESUBMIT
APPROVAL SIGNATURE
DATE
PROOF IS OK TO PRINT
PROOF IS OK TO PRINT WITH CHANGES
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PROOF SIMULATE PRESS COLOR
PANTONE 200
PANTONE 185
PANTONE 286
PANTONE 877
BLACK

A05042

400960

Mueller's™

elbows

AMERICA'S FAVORITE PASTA

MADE FROM 100% SEMOLINA

Mueller's

COOKTIME: 8 TO 10 MINUTES

[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]		[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]

COOKING DIRECTIONS

1. Bring water to a rapid boil. Add salt (1 to 2 tsp), if desired.
2. Add elbows, stirring to separate; return to boil.
3. Cook uncovered, stirring occasionally, [illegible] or until desired tenderness.
4. Drain. Serve immediately.

TIPS

- Reduce cook time slightly when using in a recipe that requires further cooking.
- If using in a salad, rinse immediately with cold water; drain.

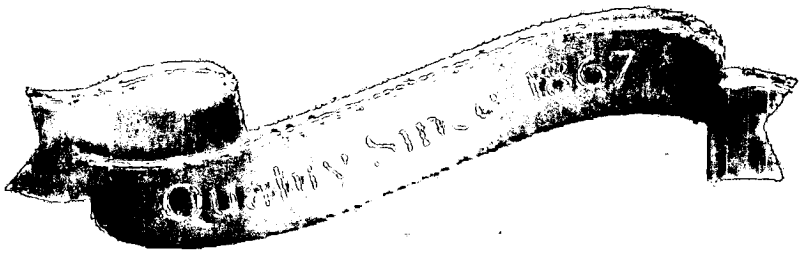
Quality of Bestfoods products is guaranteed. We value your comments and questions, please call 1-800-338-8831.

BESTFOODS

Product of U.S.A.
MU-00213-CT-09

Mueller's™

ENRICHED MACARONI



elbows

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NET WT 16 OZ (1 LB) 454g

PC 40640

Mueller's

elbows

A05060

A CHOLESTEROL FREE, SODIUM FREE FOOD

Nutrition Facts

Serving Size 2 oz dry (56g/about 1/2 cup)
Servings Per Package 8

Amount Per Serving		
Calories 210	Calories from Fat 10	
		% Daily Value*
Total Fat 1g		2%
Saturated Fat 0g		0%
Polyunsaturated Fat 0.5g		
Monounsaturated Fat 0g		
Cholesterol 0mg		0%
Sodium 0mg		0%
Total Carbohydrate 42g		14%
Dietary Fiber 1g		4%
Sugars 2g		
Protein 7g		6%
Vitamin A 0%	• Vitamin C 0%	
Calcium 0%	• Iron 10%	
Thiamin 35%	• Riboflavin 15%	
Niacin 15%	• Folic Acid 30%	

* Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g
Protein		50g	65g

INGREDIENTS: DURUM WHEAT SEMOLINA, ENRICHED WITH B VITAMINS (NIACIN, THIAMIN MONONITRATE, RIBOFLAVIN, FOLIC ACID) AND IRON (FERROUS SULFATE).

Distributed by:
Westwood
Englewood Cliffs, NJ
07632-0976

FO 00997-00 1
PC 12- 7803-0 1
05-00

03

Mueller's

Make pasta better!

CLASSIC

2 Tbsp Argo® corn starch
1 tsp salt
1/2 tsp dry mustard (optional)
1/4 tsp pepper
2 1/2 cups milk
2 Tbsp margarine or butter
2 cups (8 oz) shredded American or Cheddar cheese, divided
8 oz MUELLER'S elbows (about 1 3/4 cups), cooked 7 minutes and drained

1. In medium saucepan combine first 4 ingredients; stir in milk. Add margarine; stirring constantly bring to a boil over medium-high heat and boil 1 minute. Remove from heat.
2. Stir in 1 3/4 cups cheese until melted. Add elbows. Pour into greased 2-quart casserole. Sprinkle with reserved cheese
3. Bake uncovered in 375°F oven 25 minutes or until lightly browned.

MAKES 4 to 6 SERVINGS

PREP TIME: 12 MINUTES
BAKE TIME: 25 MINUTES

BAKED HAM 'N' CHEESE MACARONI: In step 2, stir in 1 cup diced ham with elbows.

Garden

3/4 cup Hellmann's® real or light mayonnaise or low fat mayonnaise dressing
2 Tbsp cider vinegar
1 Tbsp prepared mustard (optional)
1 tsp sugar
1 tsp salt
1/4 tsp pepper
8 oz MUELLER'S elbows (about 1 3/4 cups), cooked, rinsed with cold water and drained
1 cup sliced celery
1 cup chopped green or red pepper
1/4 cup chopped onion

1. In large bowl combine first 6 ingredients.
2. Add elbows, celery, green pepper and onion; toss to coat.
3. Cover; chill to blend flavors.

MAKES 5 CUPS

PREP TIME: 10 MINUTES

TUNA MACARONI SALAD: In step 2, add 1 can (6 oz) tuna, drained and flaked.

SHRIMP MACARONI SALAD: In step 2 add 1/2 lb cooked, cleaned small shrimp.

CARTON MADE FROM 100% RECYCLED PAPERBOARD MINIMUM 35% POST-CONSUMER CONTENT

A05061

R1200

Mueller's
Spaghetti

APPROXIMATE COOKING TIME
10 to 11 minutes
Cook "al dente" (firm to bite)
for full flavor
COOKING GUIDELINES
1 lb. pasta serves 6-8

COOKING INSTRUCTIONS
1. Boil water (4 quarts per 1 lb. of pasta).
2. Add salt to taste (optional).
3. Add pasta. Wait for reboil.
4. Stir frequently. Cook until "al dente" (firm to the bite), approximately 10 to 11 minutes.
5. Remove from heat and drain.

100% Satisfaction Guaranteed –
We value your comments and questions, please call
1-877-EAT-PASTA
Visit our website
www.muellerspasta.com
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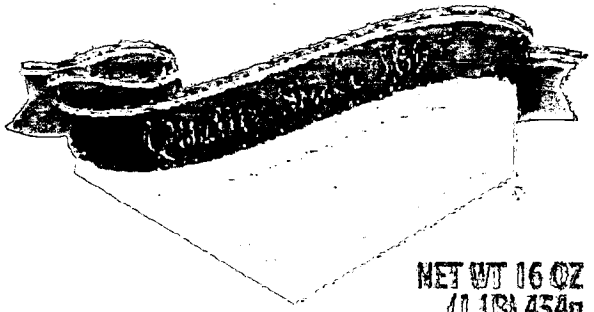
AMERICAS FAVORITE PASTA
MADE FROM 100% SEMOLINA

Mueller's™
ENRICHED
Spaghetti



NET WT 16 OZ
(1 LB) 454g

Mueller's
Spaghetti

A05064

401357

A CHOLESTEROL FREE,
SODIUM-FREE FOOD

MUELLER'S

Nutrition Facts

Serving Size 2 oz. (56g/1/8 Box)
Servings Per Container 8

Amount Per Serving	
Calories 210	Calories from Fat 10
	% Daily Value*
Total Fat 1g	2%
Saturated Fat 0g	0%
Polyunsaturated Fat 0g	
Monounsaturated Fat 0g	
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 41g	14%
Dietary Fiber 2g	7%
Sugars 2g	
Protein 7g	

Vitamin A 0%	•	Vitamin C 0%	
Calcium 0%	•	Iron 10%	
Thiamine 30%	•	Riboflavin 15%	
Niacin 20%	•	Folate 25%	

* Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Calories per gram:
Fat 9 • Carbohydrate 4 • Protein 4

INGREDIENTS: DURUM SEMOLINA, NIACIN, FERROUS SULFATE (IRON), THIAMINE MONONITRATE, RIBOFLAVIN, FOLIC ACID.

Distributed By:
American Italian Pasta Co.
Excelsior Springs, MO 64024

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CLIP & SAVE!

1 lb lean ground beef	2 eggs
1/2 cup seasoned bread crumbs	2 cloves garlic, minced
1/2 cup grated Parmesan cheese	1/2 tsp pepper
1/3 cup chopped onion	2 jars (30 oz each) spaghetti sauce
1/4 cup milk	16 oz MUELLER'S spaghetti, cooked and drained

1. In large bowl combine first 8 ingredients. Shape into 20 (1 1/2-inch) meatballs.
2. In 5-quart dutch oven bring spaghetti sauce to a boil. Add meatballs; return to boil. Reduce heat to low. Partially cover; simmer 25 minutes or until meatballs are cooked through.
3. Toss spaghetti with 1 cup sauce; top with remaining sauce and meatballs.

MAKES 6 TO 8 SERVINGS

CARTON MADE FROM 100% RECYCLED PAPERBOARD MINIMUM 35% POST-CONSUMER CONTENT

69191

RD902

Mueller's Spaghetti

1. Boil water (4 quarts per 1 lb. of pasta).
2. Add salt to taste (optional).
3. Add pasta. Wait for reboil.
4. Cook uncovered, stirring occasionally, 10 to 11 minutes or until desired tenderness.
5. Remove from heat and drain.

10 to 11 minutes

1 lb. pasta serves 6-8

100% Satisfaction Guaranteed – We value your comments and questions, please call (TOLL FREE) 1-877-EAT-PASTA (1-877-328-7278)

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6

AMERICAS FAVORITE PASTA

Mueller's

QUALITY SINCE 1867

NET WT 16 OZ (1 LB) 454g

SERVING SUGGESTION

ENRICHED SPAGHETTI PRODUCT

Spaghetti

MADE FROM 100% SEMOLINA

Mueller's Spaghetti

A05066

Nutrition Facts

Amount/Serving	% DV*
Total Fat 1g	2%
Saturated Fat 0g	0%
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 8g	3%
Vitamin A 0% • Vitamin C 0% • Calcium 8% • Iron 10%	
Thiamine 30% • Riboflavin 15% • Niacin 20% • Folate 25%	

Serving Size 2 oz. (56g/1/8 Pkg) dry
Servings Per Container 8
Calories 210
Calories from Fat 10

	Dietary Fiber 2g	2%
	Sugars 2g	
	Protein 7g	

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Calories per gram:
Fat 9 • Carbohydrate 4 • Protein 4

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

INGREDIENTS: 100% DURUM SEMOLINA, NIACIN, FERROUS SULFATE (IRON), THIAMINE MONONITRATE, RIBOFLAVIN, FOLIC ACID. CONTAINS WHEAT INGREDIENTS.

Distributed By: American Italian Pasta Co.
Excelsior Springs, MO 64024

CAUTION MAY FLOW FOR
IF CYCLE IS PAST BOARD MINIMUM
35 - POST CONSUMER CONTENT

9978

Mueller's

CLASSIC

2 Tbsp Argo® corn starch
1 tsp salt
1/2 tsp dry mustard (optional)
1/4 tsp pepper
2 1/2 cups milk
2 Tbsp margarine or butter
2 cups (8 oz) shredded American or Cheddar cheese, divided
8 oz MUELLER'S elbows (about 1 3/4 cups), cooked 7 minutes and drained

1. In medium saucepan combine first 4 ingredients, stir in milk. Add margarine, stirring constantly, bring to a boil over medium-high heat and boil 1 minute. Remove from heat.
2. Stir in 1 1/4 cups cheese until melted. Add elbows. Pour into greased 2-quart casserole. Sprinkle with reserved cheese.
3. Bake uncovered in 375°F oven 25 minutes or until lightly browned.

MAKES 4 to 6 SERVINGS

PREP TIME: 12 MINUTES
BAKE TIME: 25 MINUTES

BAKED HAM 'N' CHEESE MACARONI: In step 2, stir in 1 cup diced ham with elbows.

3/4 cup Hellmann's® real or light mayonnaise or low fat mayonnaise dressing
2 Tbsp cider vinegar
1 Tbsp prepared mustard (optional)
1 tsp sugar
1 tsp salt
1/4 tsp pepper
8 oz MUELLER'S elbows (about 1 3/4 cups), cooked, rinsed with cold water and drained
1 cup sliced celery
1 cup chopped green or red pepper
1/4 cup chopped onion

1. In large bowl combine first 8 ingredients.
2. Add elbows, celery, green pepper and onion; toss to coat.
3. Cover; chill to blend flavors.

MAKES 3 CUPS

TUNA MACARONI SALAD: In step 2, add 1 can (6 oz) tuna, drained and flaked.

SHRIMP MACARONI SALAD: In step 2, add 1/2 lb cooked cleaned small shrimp.

Mueller's

COOKING: 8 TO 10 MINUTES

2	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]

COOKING DIRECTIONS

1. Bring water to a rapid boil. Add salt (1 to 2 tsp), if desired.
2. Add elbows, stirring to separate; return to boil.
3. Cook uncovered, stirring occasionally, 8 to 10 minutes or until desired tenderness.
4. Drain. Serve immediately.

TIPS

- Reduce cook time slightly when using in a recipe that requires further cooking.
- If using in a salad, rinse immediately with cold water; drain.

Quality of BEST FOODS products is guaranteed. We value your comments and questions, please call 1-800-338-8831.

CPC International

Product of U.S.A.
MU-00213-C T-05

MADE FROM 100% SEMOLINA

Mueller's

ENRICHED MACARONI PRODUCT

Quality Since 1867

ELBOWS

NET WT 16 OZ (1 LB) 454g

Mueller's

ELBOWS

9145=01

BINE279
970168
KIPC#39

Mueller's

ELBOWS

R1097

Nutrition Facts

Serving Size 2 oz dry (56g/about 1/2 cup)
Servings Per Package 8

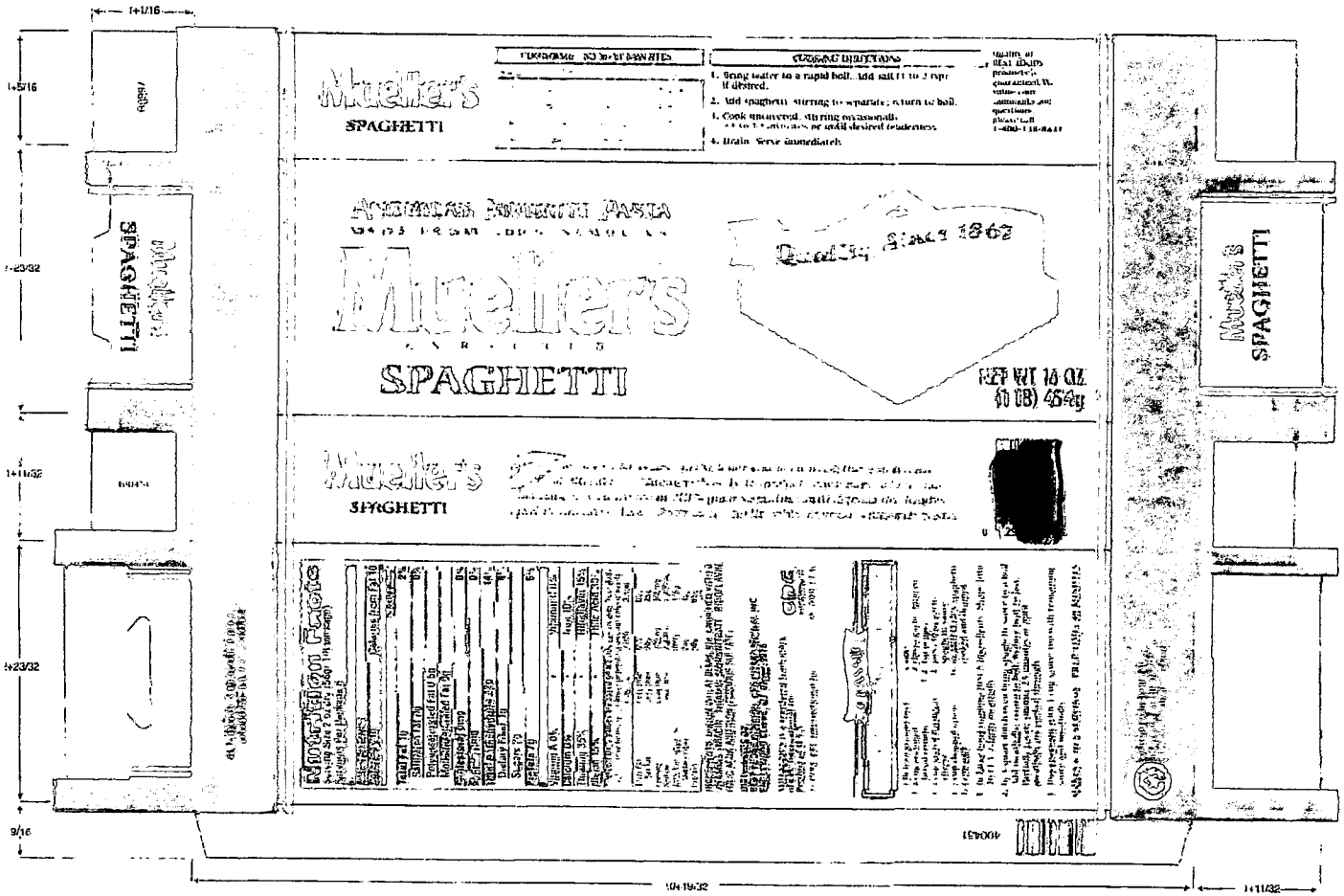
Amount Per Serving	
Calories 210	Calories from Fat 10
	% Daily Value*
Total Fat 1g	2%
Saturated Fat 0g	0%
Polyunsaturated Fat 0.5g	
Monounsaturated Fat 0g	
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 42g	14%
Dietary Fiber 2g	4%
Sugars 2g	
Protein 7g	12%
Vitamin A 0% • Vitamin C 0%	
Calcium 0% • Iron 10%	
Thiamin 35% • Riboflavin 15%	
Niacin 15% • Folic Acid 20%	

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g
Protein		50g	65g

INGREDIENTS: DURUM WHEAT SEMOLINA, ENRICHED WITH B VITAMINS (NIACIN, THIAMIN MONONITRATE, RIBOFLAVIN, FOLIC ACID) AND IRON (FERROUS SULFATE).

WESTERN CONTAINER FILE # AIPC.4 • DIE # 5 • 2+23/32 X 1+11/32 X 10+19/32 • 1 LB LONG GOOD • PRINTED SIDE



SOMERSET
Package Design Approval

	Name	Date
Graphic Design		
Technical Dept.		
Package Tech.		
Quality Assurance		

BEST FOODS
Package Design Approval

	Name	Date
Graphic Design		
Product Manager		
Sales/Logistics		
Legal		
Trademarks		
Consumer Services		
Marketing Director		

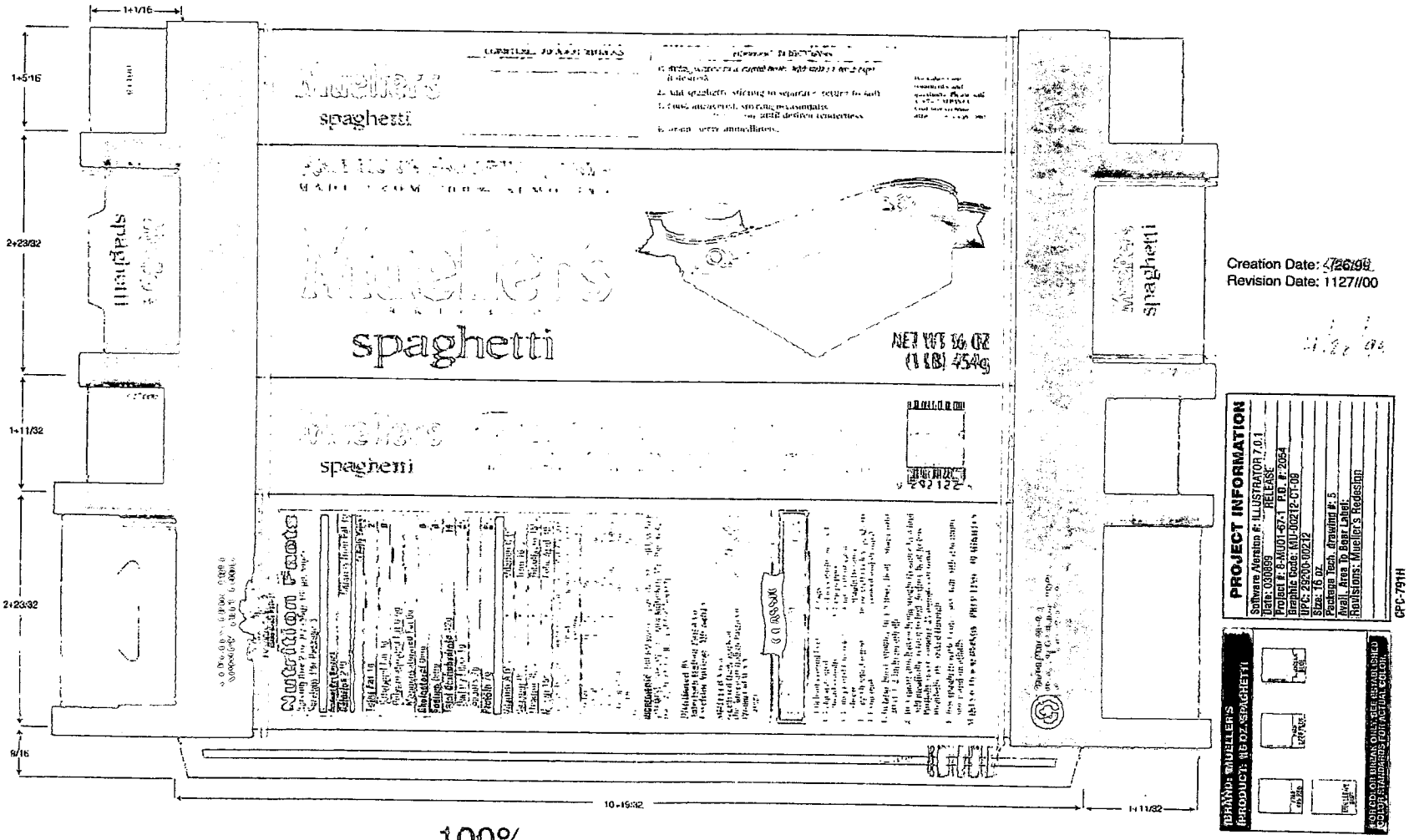
PROJECT INFORMATION

Software Version #: ILLUSTRATOR 6.0
Date: 9/15/97 Circulation #: RMM
Product #: 74UUO-42 P.O. #: 7964
Graphic Code: MU-00212-07-04
UPC: 29200-00012
Size: 16 oz.
Package Tech. drawing #:
Avail. Area To Bear Label:
Restrictions: NEW CARTON STRUCTURE
And nonsmooth measure

BRAND: (MUELLER'S
PRODUCT: 16 OZ SPAGHETTI

FOR GOOD BAR/AK ONLY USE PEST PUBLISHING
COLOR STANDARDS, PANTONE, COLOR

WESTERN CONTAINER FILE # AIPC.4 • DIE # 5 • 2+23/32 X 1+11/32 X 10+19/32 • 1 LB LONG GOOD • PRINTED SIDE



100%

A05019

401630

Mueller's®

Ruffles

Mueller's®

Ruffles

APPROXIMATE COOKING TIME

9 to 10 minutes

COOKING GUIDELINES

1 lb. pasta serves 6-8

COOKING INSTRUCTIONS

1. *Boil water (4 quarts per 1 lb. of pasta).*
2. *Add salt to taste (optional).*
3. *Add pasta. Wait for reboil.*
4. *Cook uncovered, stirring occasionally, 9 to 10 minutes or until desired tenderness.*
5. *Remove from heat and drain.*

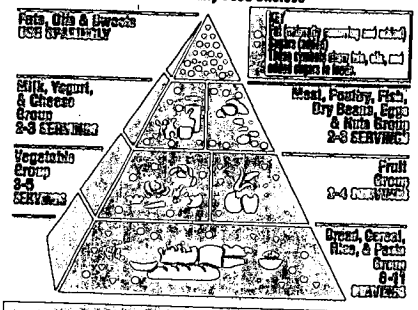
Mueller's Create-A-Meal

Mueller's inspires endless meal PASTAbilities! Mix n' Match from the chart below.

Start with	Pick a Sauce	Add a Veggie	Add a Meat
8 oz Mueller's Ruffles, cooked and drained.	1 cup pesto sauce	1 cup cooked mixed vegetables	1 lb browned ground beef
	2 cups Alfredo sauce	6 sliced mushrooms	1-1/2 cup Diced ham
	1/2 cup Italian dressing	2 cups cooked broccoli	6 oz can tuna
	1 cup cheese sauce	1 cup sautéed peppers and onions	1 lb sliced, cooked steak
	1-1/2 cup pasta sauce	1-1/2 cup chopped tomatoes	1-1/2 lb sliced, cooked chicken

Food Guide Pyramid

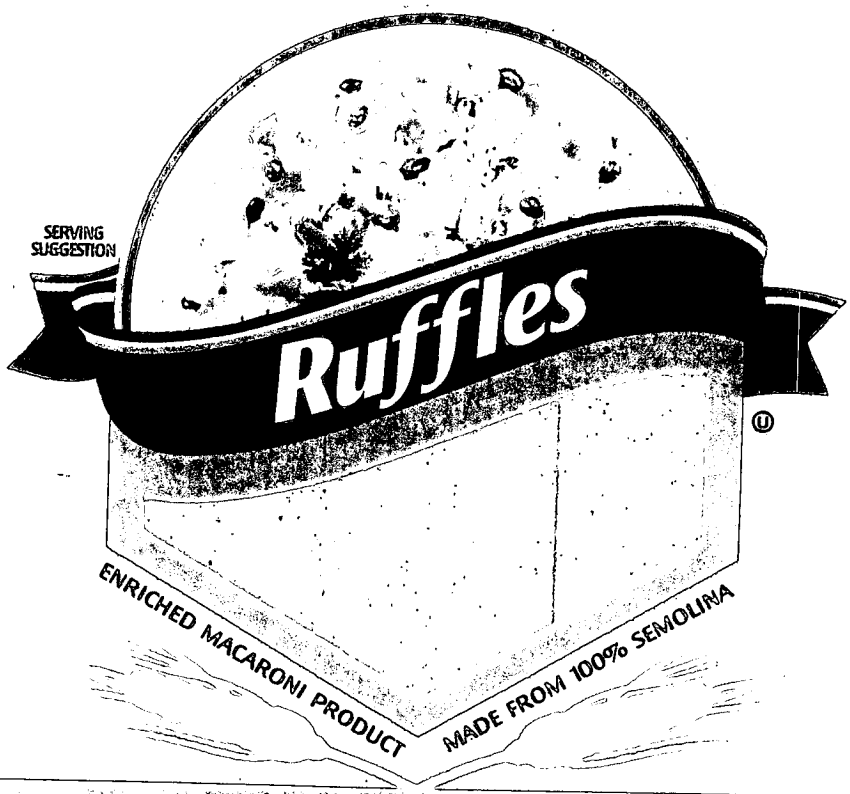
A Guide to Daily Food Choices



AMERICA'S FAVORITE PASTA

Mueller's®

QUALITY SINCE 1867



NET WT 16 OZ (1 LB) 454g

5287

Mueller's®

Ruffles

291642 8

R0202

Nutrition Facts

Serving Size 3/4 Cup (56g)
Servings Per Container 8

Amount Per Serving

Calories 210 Calories from Fat 10

	% Daily Value*
Total Fat 1g	2%
Saturated Fat 0g	0%
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 41g	14%
Dietary Fiber 2g	7%
Sugars 2g	
Protein 7g	

Vitamin A 0%	•	Vitamin C 0%	
Calcium 0%	•	Iron 10%	
Thiamine 30%	•	Riboflavin 15%	
Niacin 20%	•	Folate 25%	

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

		Calories: 2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Calories per gram:
Fat 9 • Carbohydrate 4 • Protein 4

INGREDIENTS: 100% DURUM SEMOLINA, NIACIN, FERROUS SULFATE (IRON), THIAMINE MONONITRATE, RIBOFLAVIN, FOLIC ACID.
CONTAINS WHEAT INGREDIENTS

Distributed By:
American Italian Pasta Co.
Excelsior Springs, MO 64024

100% Satisfaction Guaranteed –
We value your comments and questions, please call (TOLL FREE)
1-877-EAT-PASTA
(1-877-328-7278)

Visit our website
www.muellerspasta.com

Product of U.S.A.

MUELLER'S is a registered trademark of the American Italian Pasta Company
©2002

CARTON MADE FROM 100% RECYCLED PAPERBOARD MINIMUM 35% POST-CONSUMER CONTENT

Mueller's®

For over 135 years, pasta lovers have enjoyed the great taste of Mueller's. Our pasta cooks to perfect tenderness every time because it's made from 100% pure semolina milled from the highest quality durum wheat. Taste why Mueller's is America's favorite pasta!

CLIP & SAVE!

1 cup ranch dressing
1 cup chunky salsa with garlic
1 bunch cilantro, chopped fine
1 red pepper, diced
1 green pepper, diced
1 can (15 – 19 oz) black beans, rinsed and drained
1/2 cup red onions, diced
8 oz (1/2 pkg) MUELLER'S Ruffles, cooked, rinsed with cold water and drained

Blend together ranch dressing and salsa; add chopped cilantro. In a separate bowl toss all other ingredients together. Add dressing. Mix evenly and chill 1/2 hour.

MAKES 8-10 SERVINGS PREP TIME: 15 MINUTES

CLIP & SAVE!

2 Tbsp olive oil
1 cup minced sweet red pepper
1/2 cup finely chopped onion
2 large cloves garlic, minced or pressed, or 2 tsp garlic powder
1/3 cup water
2 chicken flavor bouillon cubes
2 Tbsp chopped fresh basil or 1 Tbsp dry basil
2 Tbsp heavy cream
8 oz (1/2 pkg) MUELLER'S Ruffles, cooked and drained

In large skillet heat olive oil over medium heat. Add red pepper, onion and garlic; sauté 4 minutes. Stir in water, bouillon cubes and basil. Stirring occasionally, bring to boil. Reduce heat and simmer 4 minutes. Stir in heavy cream. Simmer, stirring constantly, 2 minutes. Spoon over pasta ruffles; toss. If desired, serve with fresh cracked pepper.

MAKES 4-6 SERVINGS PREP TIME: 20 MINUTES

Made the Authentic Italian Way

Bonus Packaged Pasta Serving

Mueller's PASTA LA BELLA®

Fettuccine ®

NET WT ~~454g~~ 500g (17.6 OZ)

Enriched Spaghetti Product
Italian Grade Durum Semolina

This Recipe on Side

Serving Suggestion

Fettuccine A La Carbonara

- 250g (half of a package) of Mueller's Pasta LaBella Fettuccine cooked according to package directions
- 1/4 lb Pancetta or bacon diced into small pieces
- 3 tbsp olive oil
- 2 tsp freshly cracked black pepper
- 3 medium eggs
- 1/2 cup peas
- 1/2 cup Parmesan, freshly grated

Cook Pancetta or bacon until crisp. Add olive oil, cheese and pepper. Break eggs into a serving bowl. Beat eggs until whites and yolks are well blended. Add more pepper to the eggs. Take the hot drained pasta and reserve 1 cup of the cooking liquid. Place pasta on beaten eggs and mix thoroughly so the heat of the pasta cooks the eggs. Add Pancetta or bacon mixture to the pasta and toss again. If pasta seems a little dry, add the reserved pasta water and toss again. Serve with more Parmesan cheese and black pepper. Serves 4 main dish entrees.

Mueller's®

PASTA LA BELLA®

401350

4146

TABBIES

EXHIBIT

8

R 201

Mueller's PASTA LaBELLA®

Fettuccine

Nutrition Facts

Serving Size: 2 oz. (55g/ 1/9 BOX)
Servings Per Container: 9

Amount Per Serving	
Calories 210	Calories from Fat 10
	% Daily Value*
Total Fat 1g	2%
Saturated Fat 0g	0%
Polyunsaturated Fat 0g	
Monounsaturated Fat 0g	
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 41g	14%
Dietary Fiber 2g	7%
Sugars 2g	
Protein 7g	

Vitamin A 0%	•	Vitamin C 0%	
Calcium 0%	•	Iron 10%	
Thiamine 30%	•	Riboflavin 15%	
Niacin 20%	•	Folate 25%	

* Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Calories per gram:
Fat 9 • Carbohydrate 4 • Protein 4

INGREDIENTS: DURUM SEMOLINA, NIACIN, FERROUS SULFATE (IRON), THIAMINE MONONITRATE, RIBOFLAVIN, FOLIC ACID.

Distributed By:
American Italian Pasta Company
Excelsior Springs, MO 64024

100% Satisfaction Guaranteed –
We value your comments and questions, please call 1-877-EAT-PASTA

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Visit our website
www.pastalabella.com

Product of U.S.A.

AIPC

0 26203 62

The flavor of Italy in every bite

In the heart of the beautiful Lombardy region, the breadbasket of Italy, lies the picturesque town of Verolanuova: our home in Italy and the inspiration for our authentic Pasta LaBella.

As in Italy, we select only the finest Italian grade durum semolina for our pasta, then we follow the same traditional Italian milling processes and pasta-making methods. We also package Pasta LaBella as they do in Italy — in grams. Giving you 10 percent more pasta than most American-made products. That's like getting an extra serving in every package.

We invite you to try the authentic recipes found on every package of Mueller's Pasta LaBella. Created and refined by our Italian chef, we trust you'll find these pasta recipes as delicious as they are easy to prepare. Buon appetito!

PASTA COOKING TIME
11 to 12 minutes
Cook "al dente" (firm to the bite) for full flavor

COOKING GUIDELINES
500g pasta serves 7-9

COOKING INSTRUCTIONS
1. Boil water (4 quarts per 500g of pasta).
2. Add salt to taste (optional).
3. Add pasta. Wait for reboil.
4. Stir frequently.
5. Remove from heat and drain.

20

Exhibit 6

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

AMERICAN ITALIAN PASTA COMPANY	)	**OPPOSITION NO.: 91-161,373**
	)	**SERIAL NO.:**
Opposer,	)	**MARK:**
	)	
v.	)	
	)	
BARILLA G. E R. FRATELLI-SOCIETA PER AZIONI,	)	
	)	
Applicant.	)	

DECLARATION OF DREW LERICOS

I, Drew Lericos, declare:

1. I am the Director of Marketing for American Italian Pasta Company ("AIPC"), and am submitting this declaration in support of AIPC's Brief in Opposition to Applicant's Motion for Partial Summary Judgment, And, In the Alternative, Motion to Reopen. I have held this position since January 2004.

2. I have worked in the field of marketing and brand promotion for more than 22 years, and in connection with packaged food and nutritional supplements for more than 10 years.

3. As Director of Marketing for AIPC, I oversee all marketing and brand promotion projects for AIPC's products, including Mueller's pasta products.

4. Based on my experience and research, I have learned that consumers of pasta products regularly make purchasing decisions at the point of purchase. Thus, the appearance of and messages on the packaging on the shelf are of critical important in selling pasta, including Mueller's pasta products. While a consumer may continue their purchases to an acceptable group of pasta brand alternatives based on factors

such as past experience or tradition, the actual selection of product is largely made based on appearance, availability and price at the supermarket.

5. Traditionally, sellers of pasta have not relied on substantial advertising to sell pasta. Nonetheless, AIPC has engaged in advertising, such as free standing inserts containing coupons. Attached as Exhibit A are copies of those advertisements. In fact, in 2002, AIPC promoted Mueller's pasta in a campaign that featured Rachel Ray, a famous television persona in the field of cooking. AMERICA'S FAVORITE PASTA conspicuously appeared in those advertisements.

Notwithstanding the limited advertising in this field, sellers have traditionally focused on promoting pasta through the packaging itself. AIPC has largely adhered to this practice, placing greater emphasis on product quality, package design and pricing, rather than advertising and other promotions for its branded pastas, such as Mueller's brand.

6. Due to the fact that the appearance of pasta packaging is critically important in purchasing decisions, AIPC has made a conscious effort to connect with the consumer through its Mueller's packaging.

7. In fact, through the study performed in 2001 for business and marketing purposes, with which I have familiarized myself and retained as an AIPC business record, a copy of which is appended as Exhibit B, AIPC has confirmed that the heritage of Mueller's and its slogan AMERICA'S FAVORITE PASTA resonates with consumers.

8. The current packaging of AIPC's Mueller's pasta products endeavors to connect the consumer with the heritage of the Mueller's brand. This includes, of course, the Mueller's trademark. It also retains, for its core products, the classic red, white and blue colors, which have appeared on Mueller's

packaging continuously for many years. A third key component intended to resonate as to the "Americaness" of the brand is the use of the slogan "AMERICA'S FAVORITE PASTA." This brand image is powerfully reinforced at the point-of-purchase by the supermarket shelf displays presently a unified image of different pasta types, each of which prominently display the three key elements of the branding slogan "AMERICA'S FAVORITE PASTA" as reflected by the photographs attached to the Report of Ann Willoughby.

9. Based on records and corporate memory, since at least as early as 1997, the slogan "AMERICA'S FAVORITE PASTA" has always appeared prominently on the front of Mueller's pasta packaging. To clarify, this slogan was retained on the Mueller's pasta packaging for its core pasta products, even when other pasta items, such as fettuccine and linguine, for example, were packaged in the blue Mueller's Pasta Labella boxes, which were discontinued after less than a year of use. Examples of the evolution of packaging, which retains the slogan AMERICA'S FAVORITE PASTA include the 1997-era packaging, attached as Exhibit C, the 2002-era packaging (with the flag), appended as Exhibit D, and the most recent (2005) package presentation, attached as Exhibit E.

10. AIPC considers its slogan AMERICA'S FAVORITE PASTA as a very valuable trademark. Through the changes to the shape, sizes and certain graphics of the pasta packaging since 1997, AIPC has retained AMERICA'S FAVORITE PASTA on its packaging because consumers expressed that it was a meaningful branding statement. This is reflected in the 2001 study commissioned and, which was appended as Exhibit F to Applicant's summary judgment motion and incorporated herein.

I declare under penalty of perjury under the laws of Texas that the foregoing is true and correct.

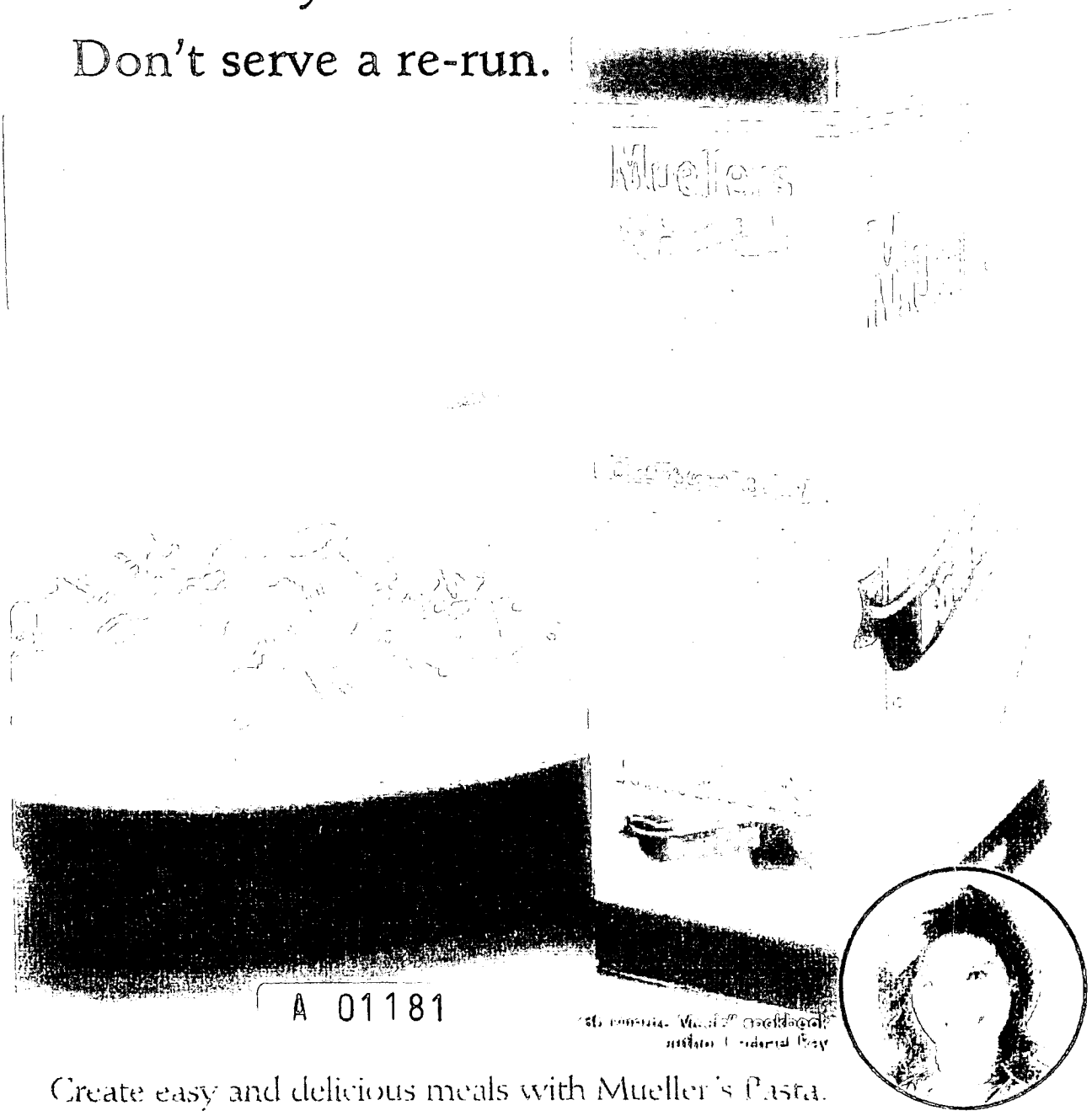
Dated: 3-3-06

Drew Lericos

Drew Lericos

Dinner is your show.

Don't serve a re-run.



A 01181

Create easy and delicious meals with Mueller's Pasta.

MANUFACTURER'S COUPON EXPIRES

Save 55¢

on any two

Mueller's

12 oz. or larger boxes

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Rachael Ray's Bowties in No Time

1 lb Mueller's Bowtie Pasta
2 tbsp extra virgin olive oil
2 turns of the pan
1 small red bell pepper, diced
1 small green bell pepper, diced
1 medium zucchini, diced
3 cloves garlic, diced
Salt and pepper to taste
1 28 oz can crushed tomatoes
1/2 cup basil leaves, shredded
Grated Parmigiano Reggiano

Cook pasta according to directions on the box. When you put the water on to boil, begin preparation for sauce. Preheat oil in large skillet over medium-high heat. Add peppers, zucchini and garlic to pan, season with salt and pepper and cook, stirring frequently, 8 to 10 minutes. Add crushed tomatoes and reduce heat to medium-low. Simmer 5 minutes, stir in basil and remove from heat. Add pasta and toss. Top with grated cheese. At the table, pass crusty bread and a green salad to complete the meal.

EXHIBIT

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A05958

MANUFACTURER'S COUPON | EXPIRES 10/31/02

Save 55¢

on any

Mueller's

12 oz. or larger box

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10/10 P31
Crop: 10/10/02
Exp: 12/31/02

Rachael Ray's Bowties in No Time

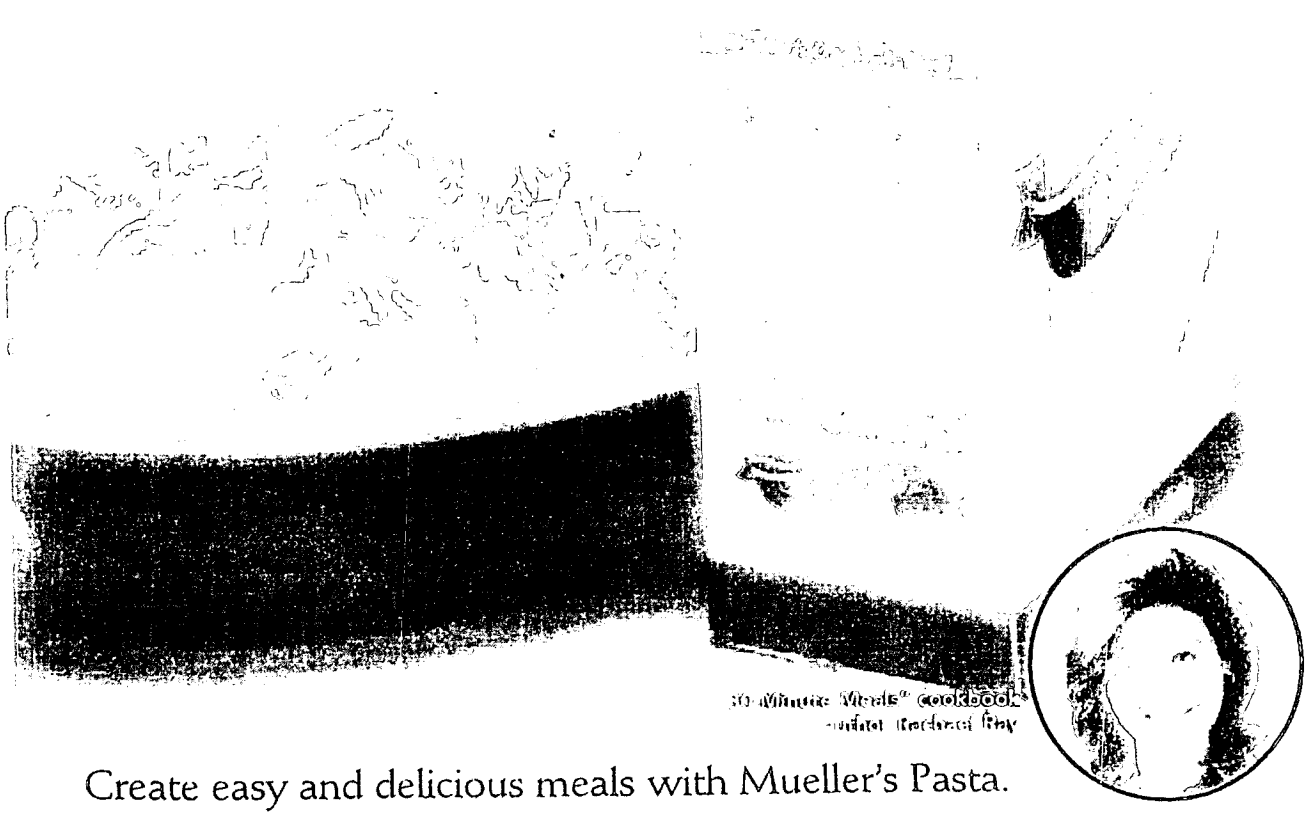
- 1 lb Mueller's Bowtie Pasta
- 2 tbsp extra virgin olive oil, 2 turns of the pan
- 1 small red bell pepper, diced
- 1 small green bell pepper, diced
- 1 medium zucchini, diced
- 3 cloves garlic, diced
- Salt and pepper to taste
- 1 28 oz can crushed tomatoes
- 1/2 cup basil leaves, shredded
- Grated Parmigiano Reggiano

Cook pasta according to directions on the box. When you put the water on to boil, begin preparation for sauce. Preheat oil in large skillet over medium-high heat. Add peppers, zucchini and garlic to pan, season with salt and pepper and cook, stirring frequently, 8 to 10 minutes. Add crushed tomatoes and reduce heat to medium-low. Simmer 5 minutes, stir in basil and remove from heat. Add pasta and toss. Top with grated cheese. At the table, pass crusty bread and a green salad to complete the meal.

A 01182

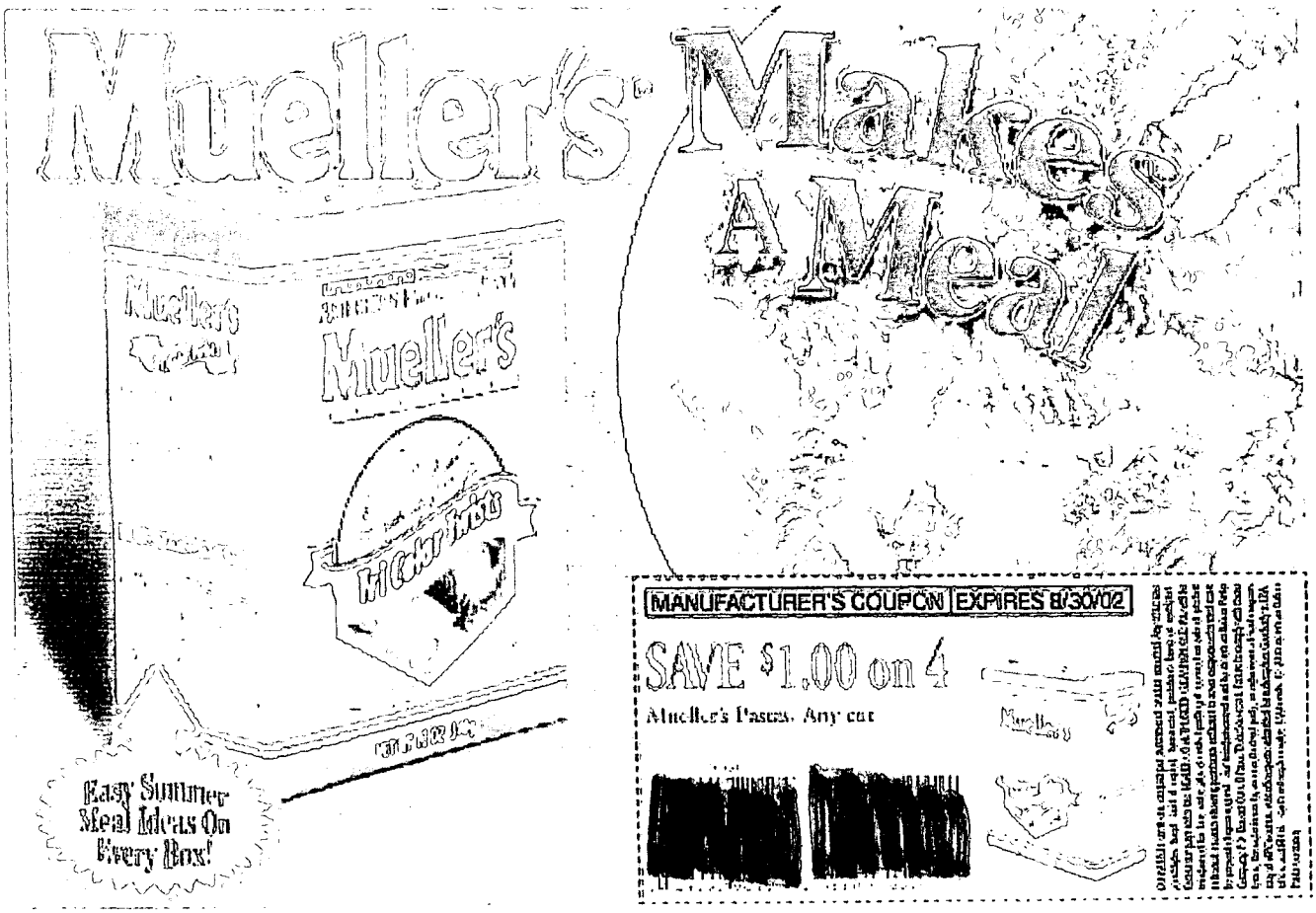
Dinner is your show.

Don't serve a re-run.



Create easy and delicious meals with Mueller's Pasta.

A05959



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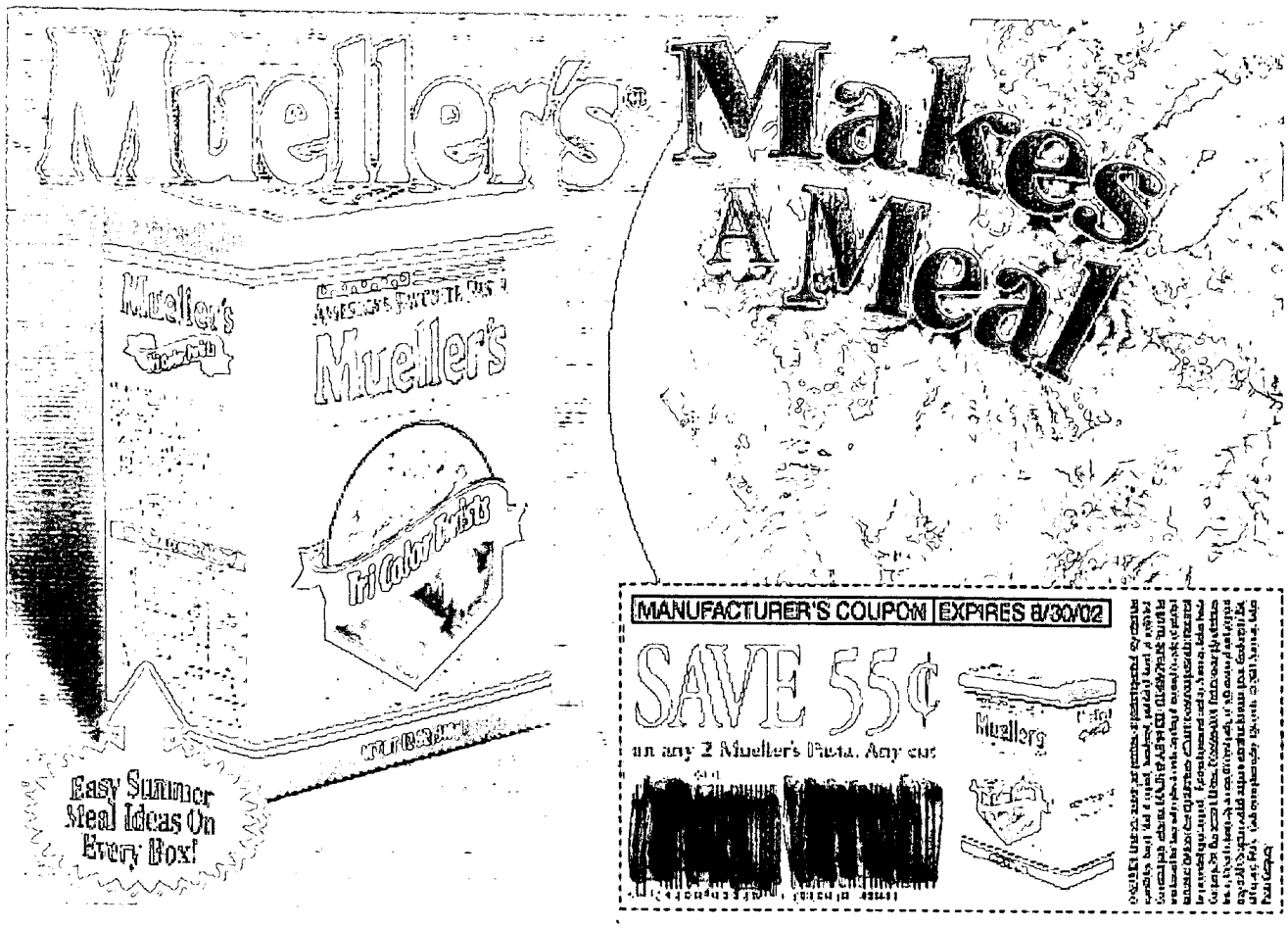

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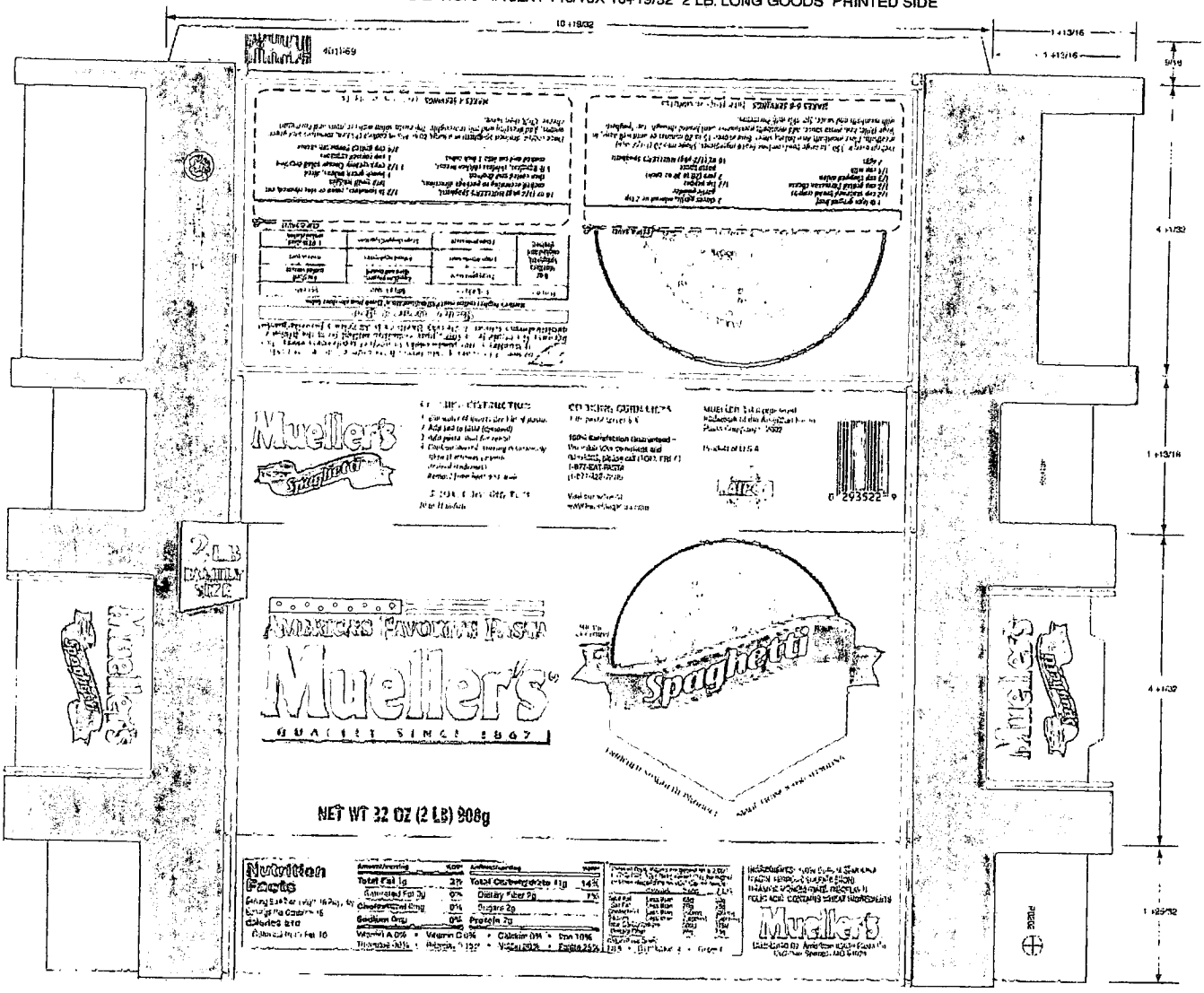

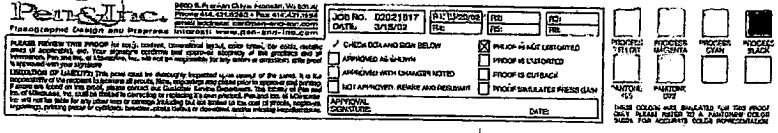

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- ☐ APPROVED AS SHOWN
- ☐ APPROVED WITH CHANGES NOTED
- ☐ NOT APPROVED - REVISE AND RESUBMIT

- ☐ PROOF IS CORRECTED
- ☐ PROOF IS OK'D AS
- ☐ PROOF SIMULATES PRESS GAIN

APPROVAL SIGNATURE DATE

PROCESS YELLOW · PROCESS MAGENTA · PROCESS CYAN · PROCESS BLACK

PANTONE 485 · PANTONE 072

PLEASE COLOR MATCH SIMULATED PLATE THIS PROOF ONLY. PLEASE REFER TO A PANTONE® COLOR GUIDE FOR ACCURATE COLOR REPRODUCTION

Jeeter

A05013

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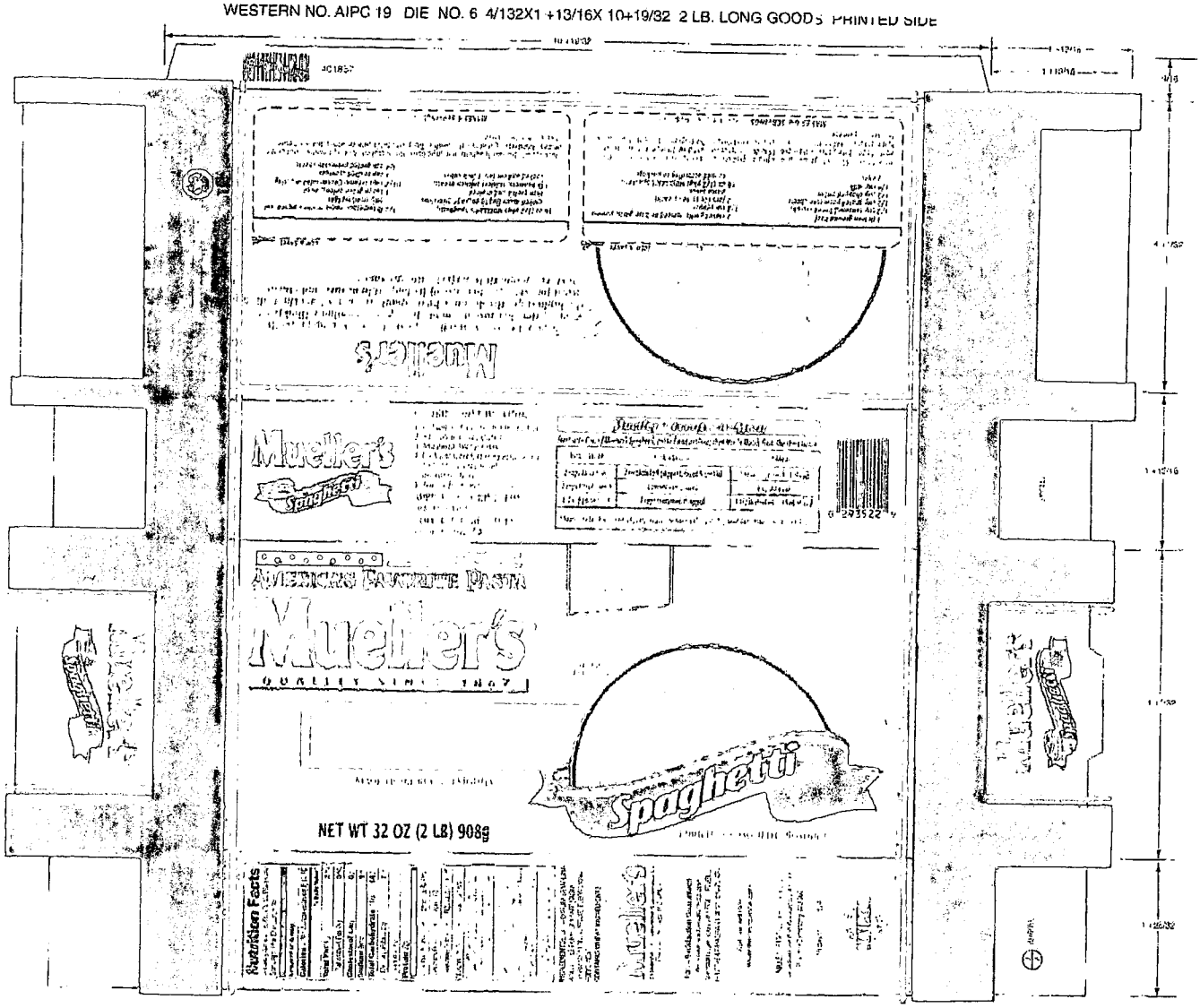

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Prod Dev Dept				
Marketing				
Customer				

Check & Proofread Carefully	QA	Prod Develop.	Mktg.	Customer
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Correct serving size (nutri facts)				
Correct UPC				
Correct shelf life formula				
Copy spelling				
Kosher/ethnic				
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Correct net weight				
Recipe reviewed				
Statement of Identity				
Correct ink/mix				
Window position				

JOB INFORMATION | DATES | SPECIAL NOTES | COLORS

A05014

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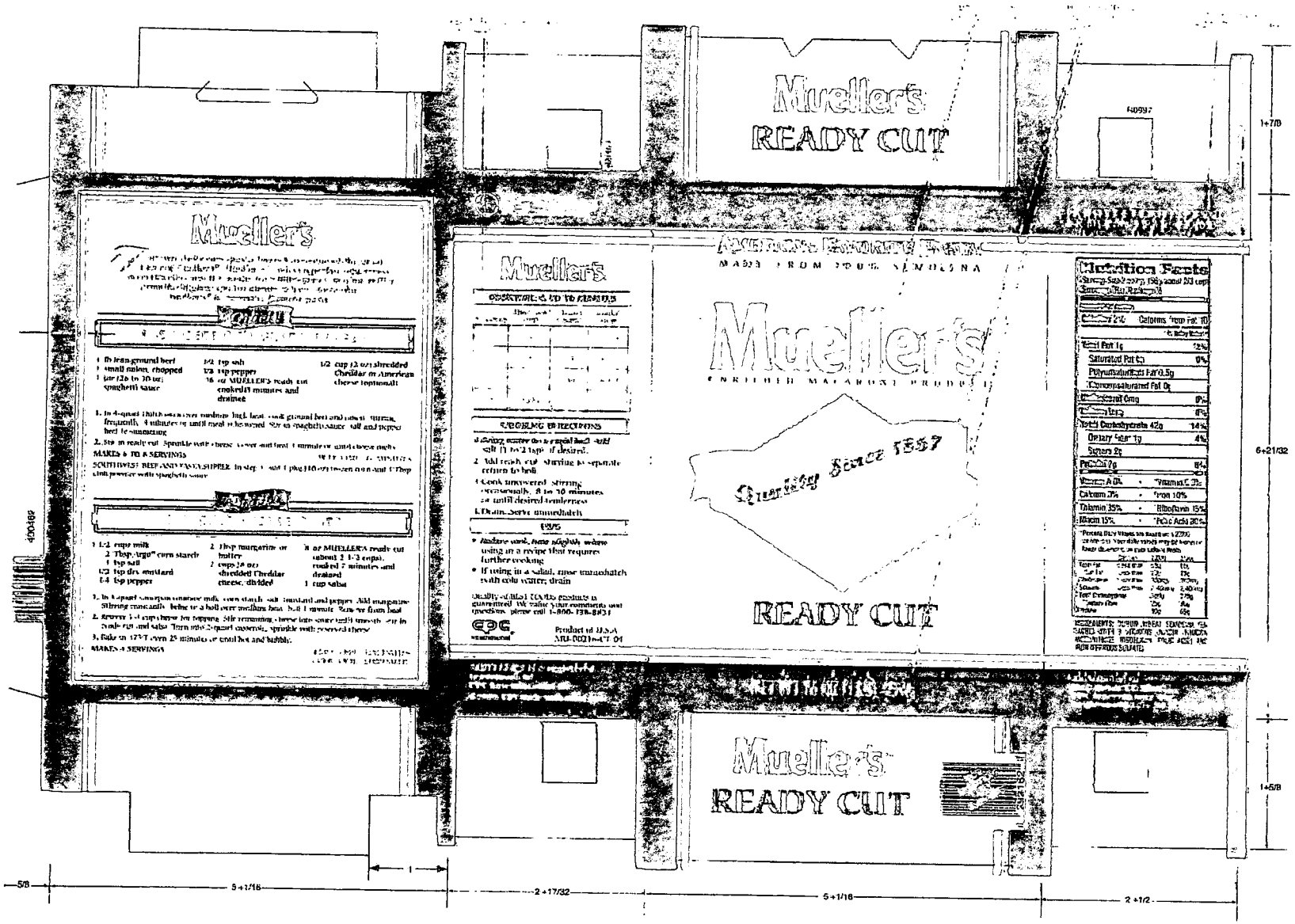

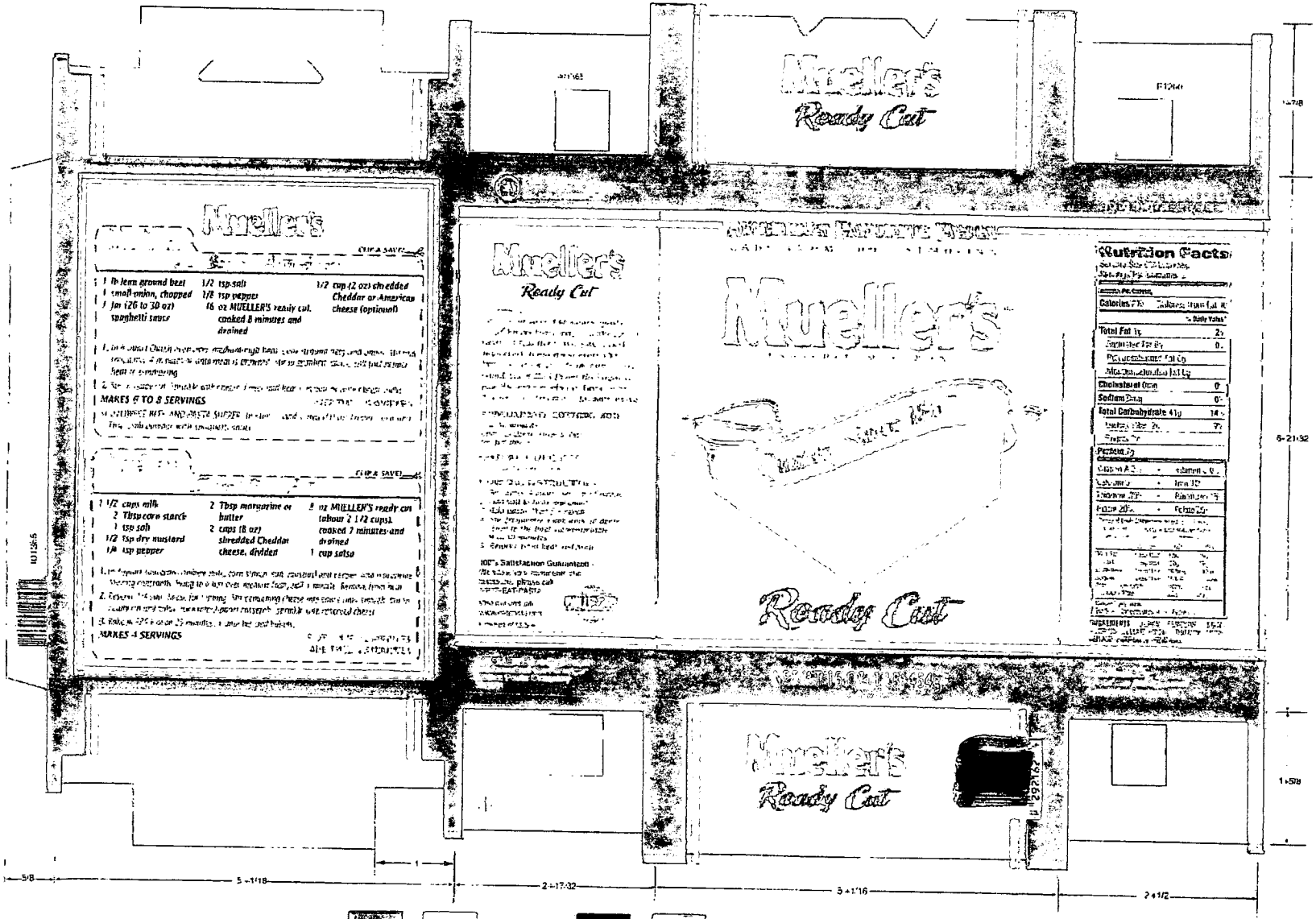
Mueller's
Ready Cut
1 lb lean ground beef
1 small onion, chopped
1 jar (26 to 30 oz) spaghetti sauce
1/2 tsp salt
1/8 tsp pepper
16 oz MUELLER'S ready cut, cooked 8 minutes and drained
1/2 cup (2 oz) shredded Cheddar or American cheese (optional)
MAKES 6 TO 8 SERVINGS
1 1/2 cups milk
2 Tbsp corn starch
1 tsp salt
1/2 tsp dry mustard
1/8 tsp pepper
2 Tbsp margarine or butter
2 cups (8 oz) shredded Cheddar cheese, divided
8 oz MUELLER'S ready cut (about 2 1/2 cups), cooked 7 minutes and drained
1 cup salsa
MAKES 4 SERVINGS
Nutrition Facts
Calories
Total Fat
Cholesterol
Sodium
Total Carbohydrate
Protein
100% Satisfaction Guarantee!
5-21/32
1-5/8
5-1/8
2-17/32
5-1/16
2-1/2
1-7/8
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1225
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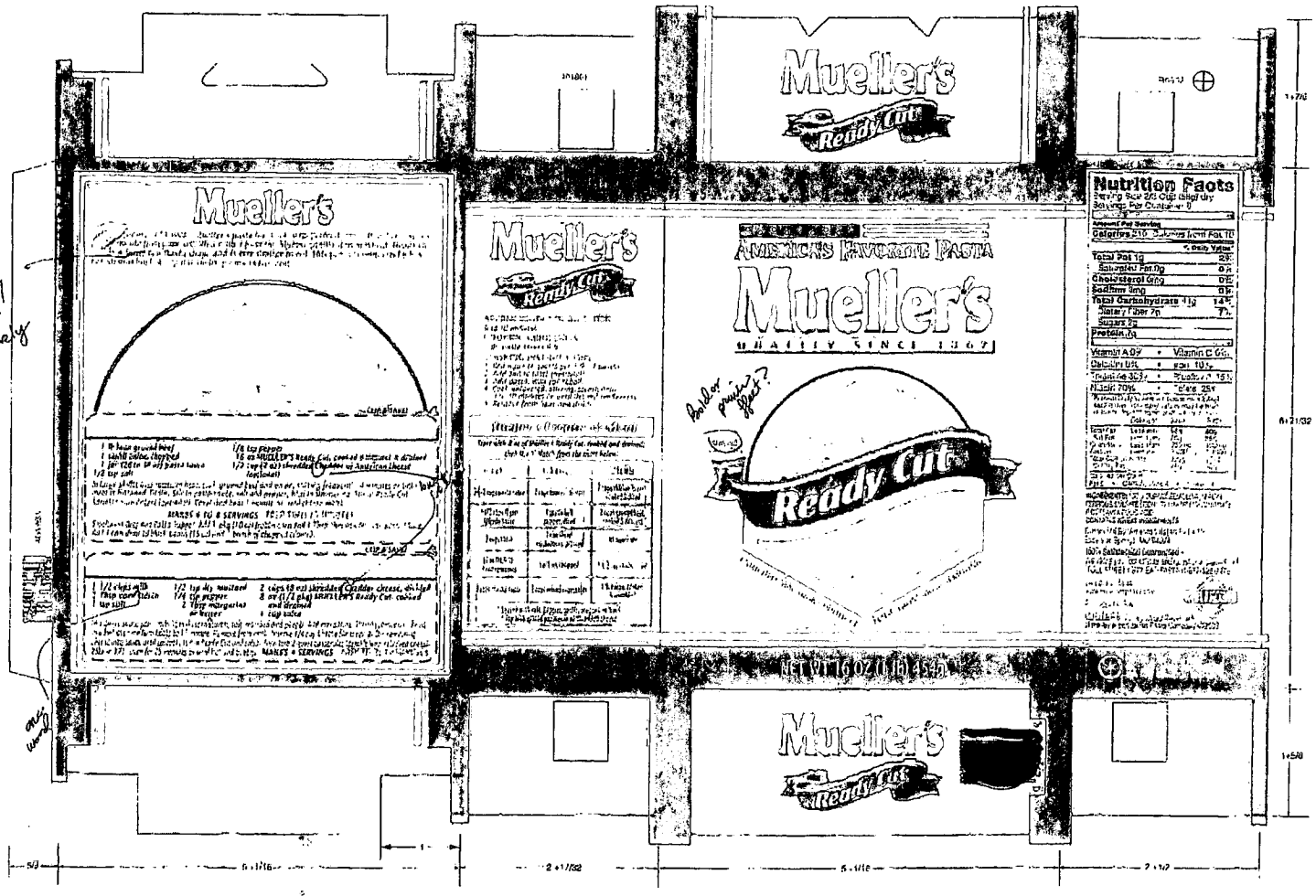

Check & Proofread Carefully	QA	Pkg Develop.	Mktg.	Customer
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Correct serving size (nutri facts)	☑	☐	☐	☐
Correct UPC	☐	☐	☐	☐
Correct dieline for Item	☐	☐	☐	☐
Copy spelling	☐	☐	☐	☐
Kosher symbol	☑	☐	☐	☐
Correct Item number	☑	☐	☐	☐
Correct net weight	☑	☐	☐	☐
Recipe reviewed	☑	☐	☐	☐
Statement of Identity	☑	☐	☐	☐
Correct cooktime	☐	☐	☐	☐
Window position	☐	☐	☐	☐

PROOF APPROVAL

	Date	Approved as is	OK with changes	Re-submit new proof
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Pkg Develop.	12.7.02	☐	☑	☐
Marketing		☐	☐	☐
Customer		☐	☐	☐

JOB INFORMATION | FONTS | SPECIAL NOTES | COLORS

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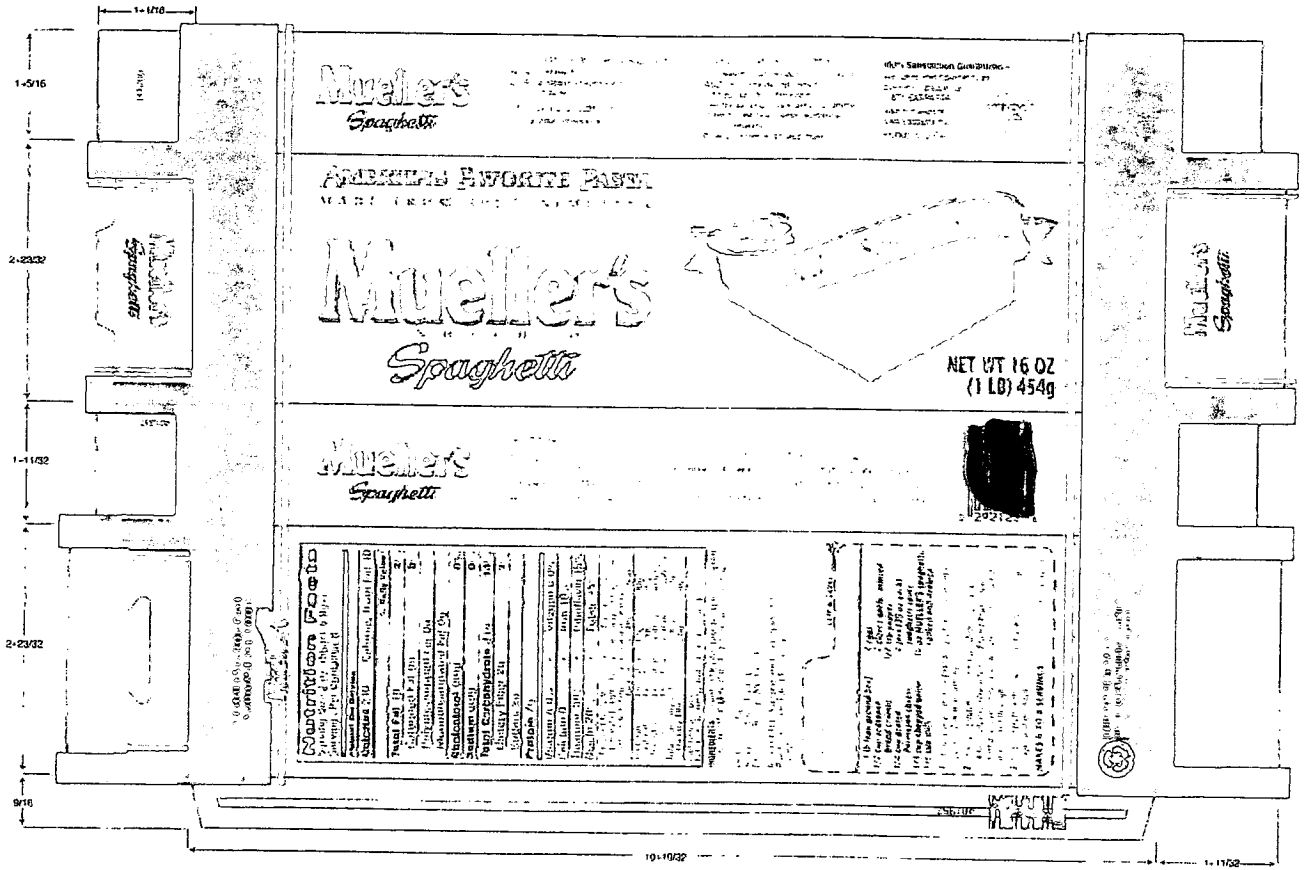
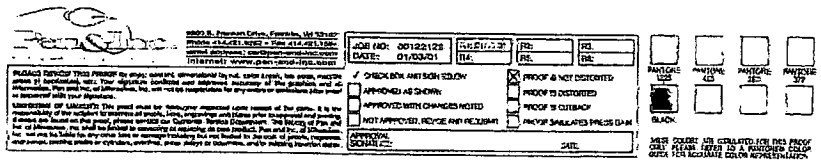
12/9/02

A05017


Mueller's
Spaghetti
AMERICA'S FAVORITE PASTA
Mueller's
Spaghetti
NET WT 16 OZ
(1 LB) 454g
Mueller's
Spaghetti
Nutritional Facts
1-5/16
2-23/32
1-11/32
2-23/32
9/16
10-10/32
1-11/32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PROOF IS NOT DISTORTED
PROOF IS DISTORTED
PROOF IS OUTBACK
PROOF SIMULATES PRESS GAIN
APPROVAL SIGNATURE
DATE
PANTONE 123
PANTONE 43
PANTONE 185
PANTONE 377
BLACK
MAGE COLORS ARE SIMULATED FOR THIS PROOF ONLY. PLEASE REFER TO A PANTONE COLOR GUIDE FOR ACCURATE COLOR REPRESENTATION

A05020

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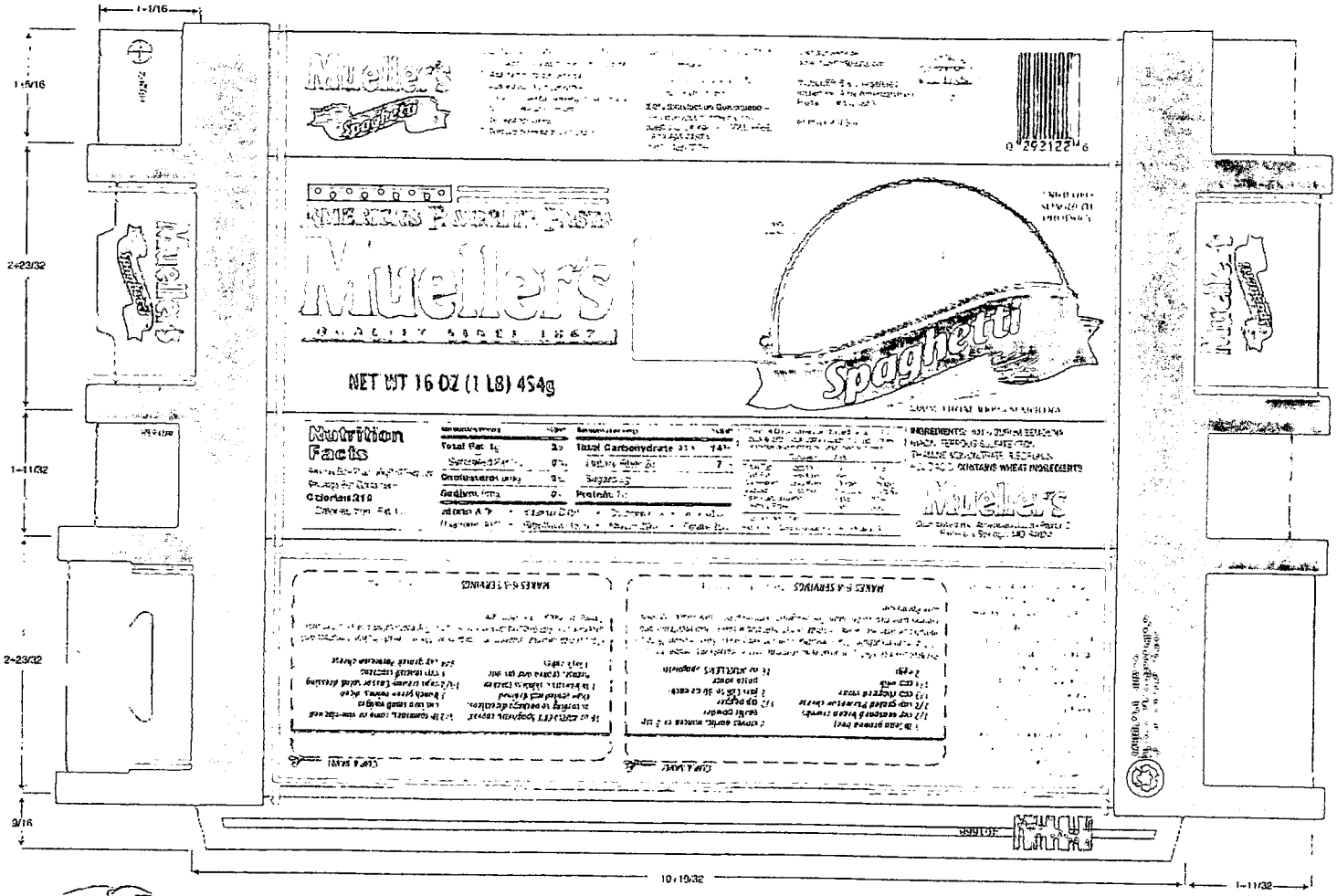

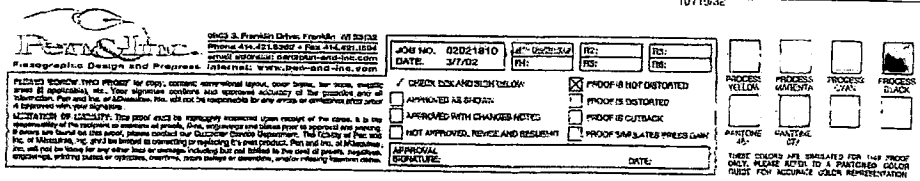

A05021

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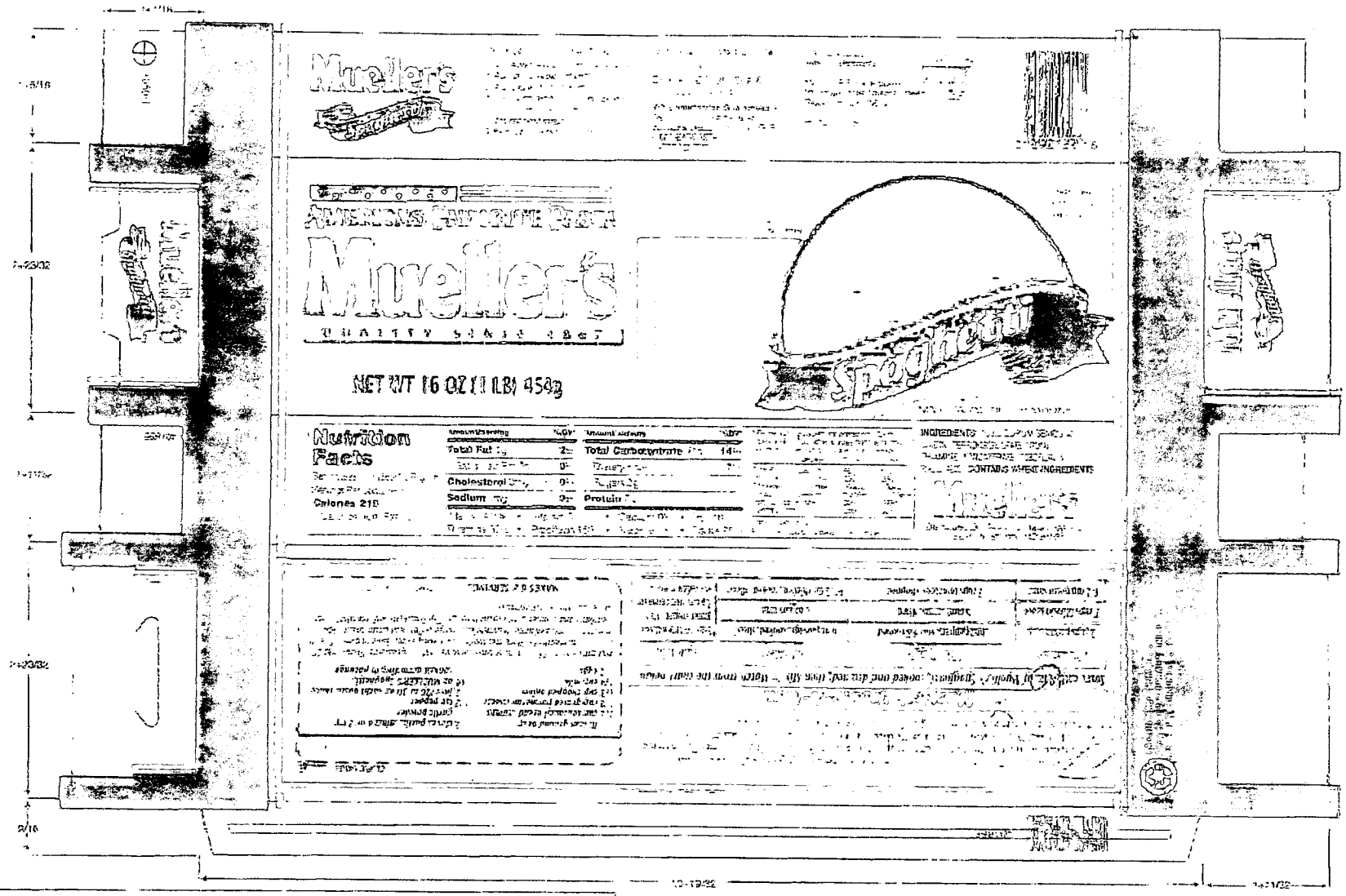

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QA Dept		☑	☐	☐
Pkg Develop		☐	☒	☐
Marketing		☐	☐	☐
Customer		☐	☐	☐

Check & Proofread Carefully	QA	Pkg Develop.	Mktg.	Customer
Correct nutri facts/ingredients	☒	☒	☐	☐
Correct serving size/nutri facts	☒	☒	☐	☐
Correct UPC	☐	☒	☐	☐
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Correct net weight	☒	☒	☐	☐
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Standards of identity	☒	☒	☐	☐
Correct coupons	☒	☒	☐	☐
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SPECIAL NOTES

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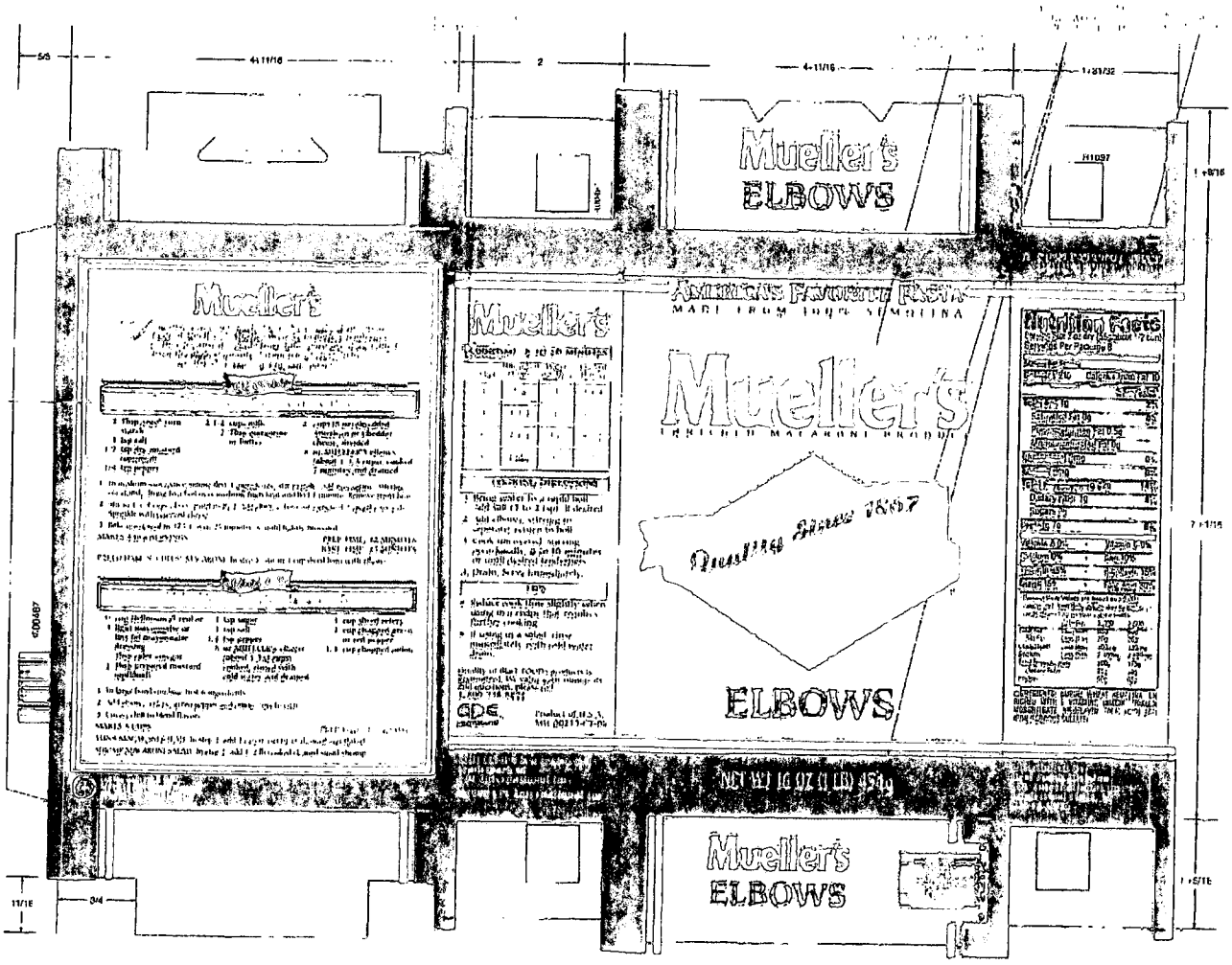

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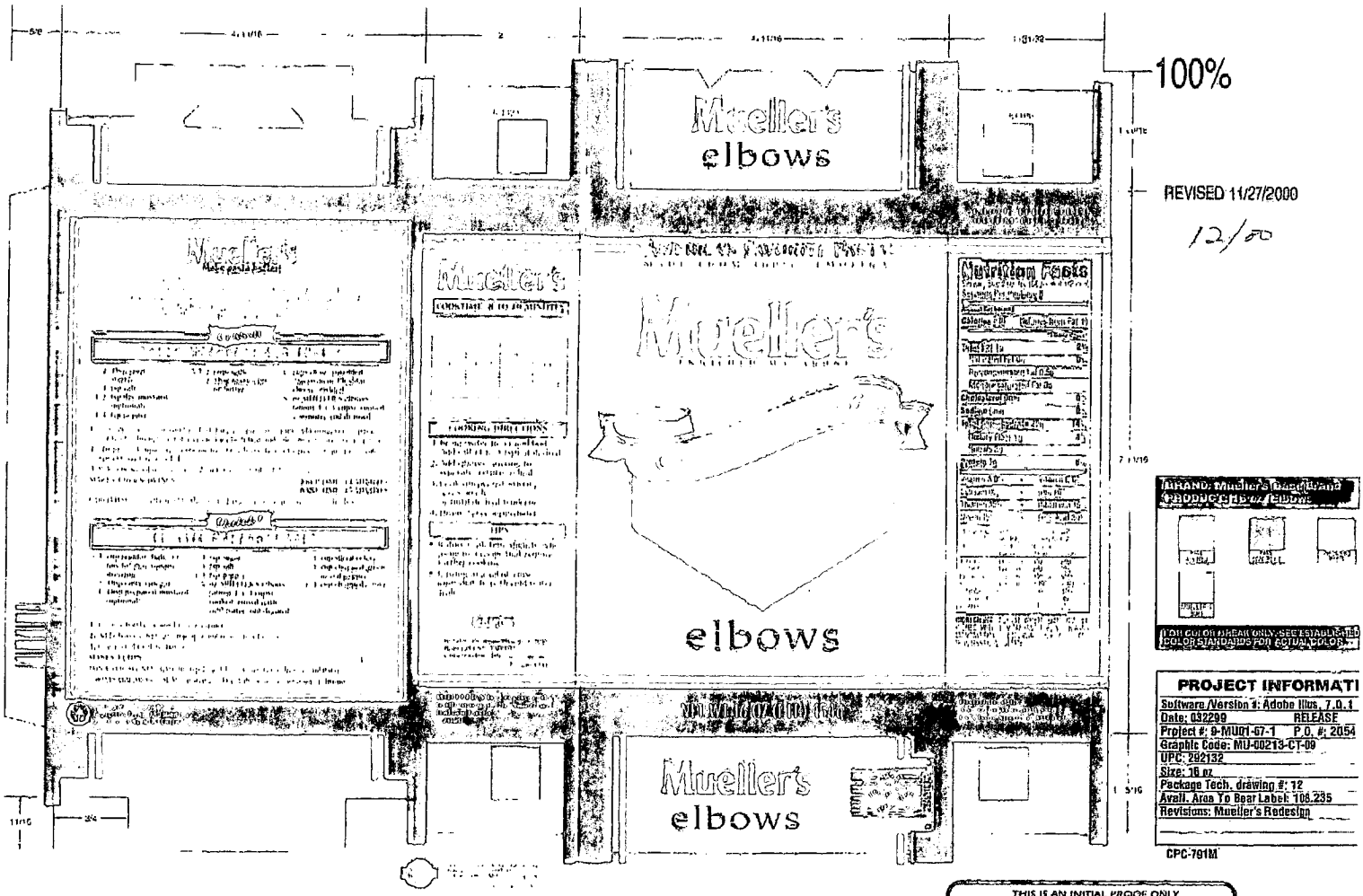

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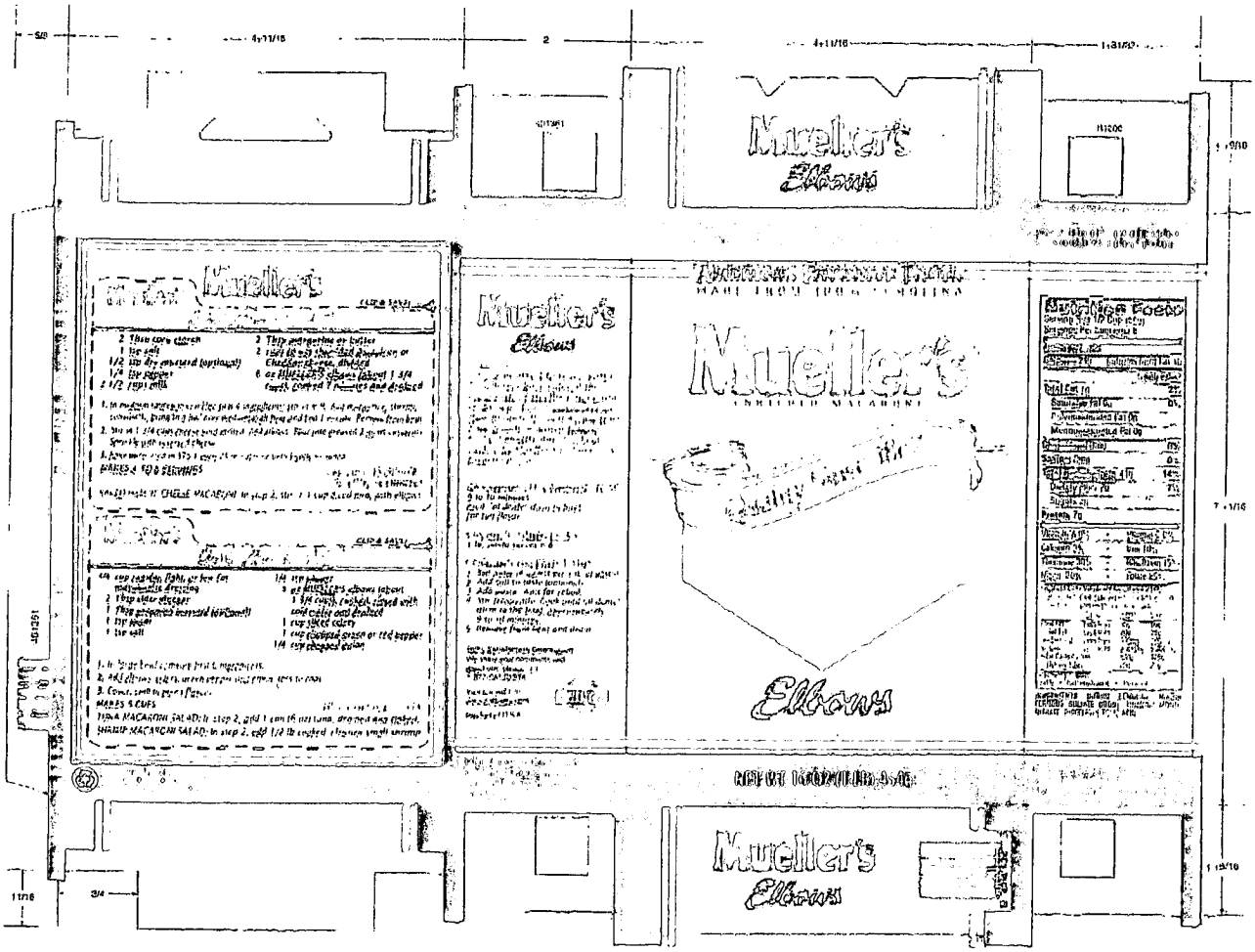
WESTERN CONTAINER CO.
4323 CLASY BLVD • KANSAS CITY MO 64130
(816) 924-5700 or FAX: (816) 924-7042

A05024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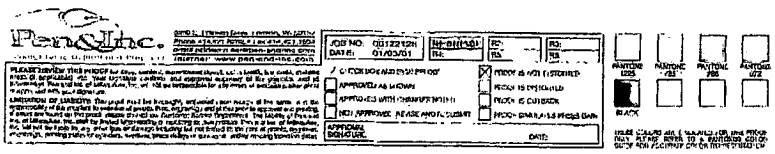
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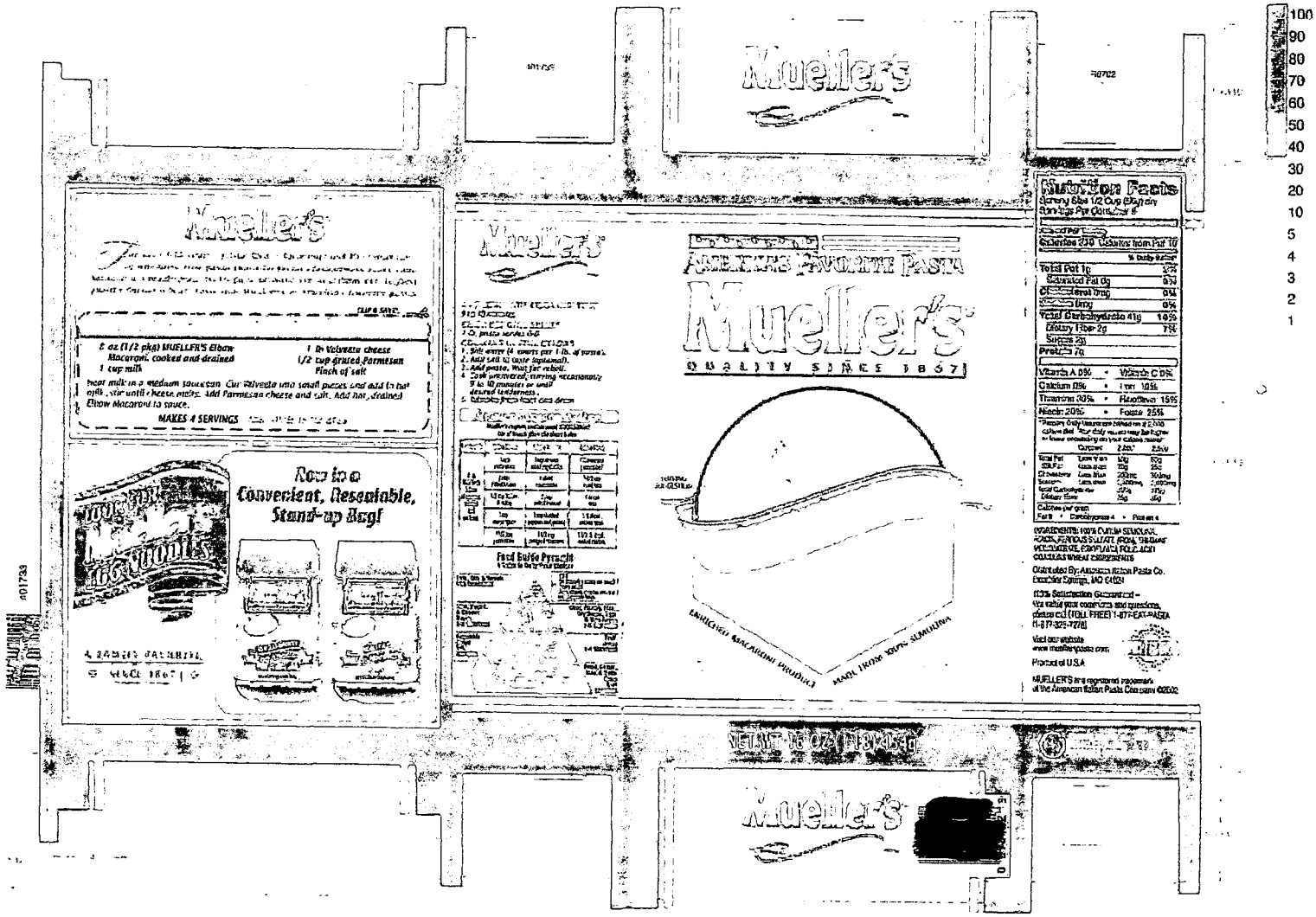

AIPC
MUELLERS
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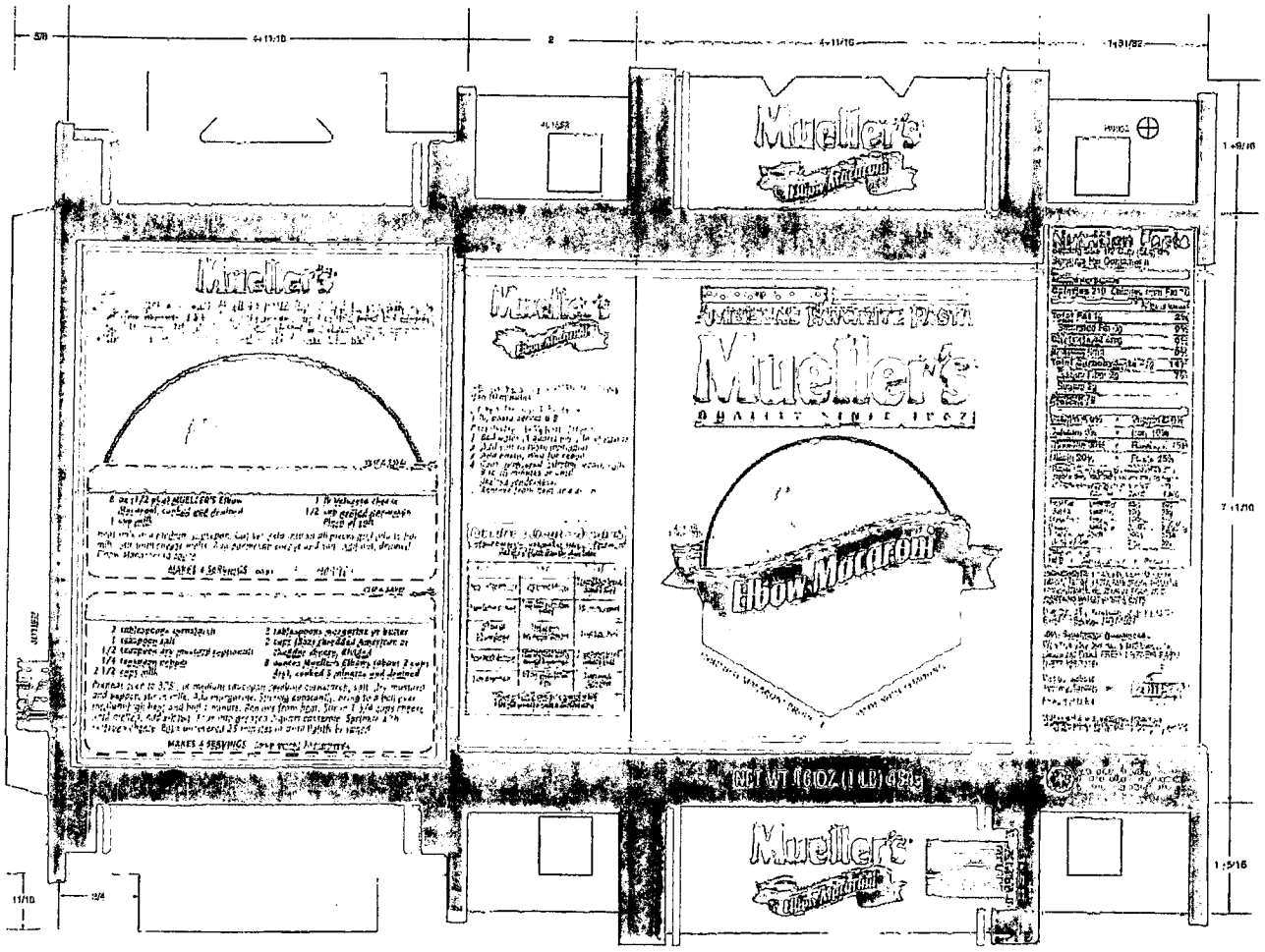

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Correct serving size (nutri facts)	☐	☐	☐	☐
Correct UPC	☐	☐	☐	☐
Correct destino for form	☐	☐	☐	☐
Copy spelling	☐	☐	☐	☐
Kosher symbol	☐	☐	☐	☐
Correct item number	☐	☐	☐	☐
Correct net weight	☐	☐	☐	☐
Recipe reviewed	☐	☐	☐	☐
Statement of identity	☒	☐	☐	☐
Correct cooktime	☐	☐	☐	☐
Window position	☐	☐	☐	☐

	Date	Approved as is	OK with changes	Re-submit new proof
QA Dept		☐	☐	☐
Pkg Develop.	1/13/03	☐	☒	☐
Marketing		☐	☐	☐
Customer		☐	☐	☐

1/6/03

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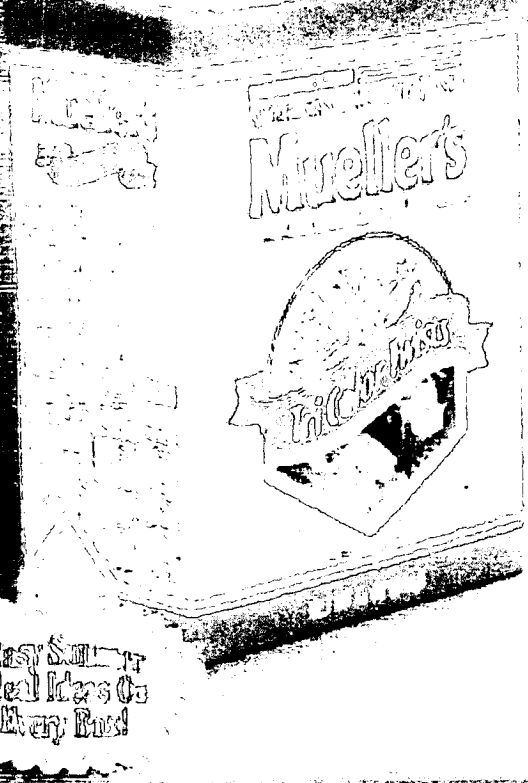
Mueller's Makes A Meal



- New Packaging
- New Advertising
- Over 15 Meal Ideas on Every Box

Mueller's is a proud sponsor of the 2002 Giant Eagle LPGA Classic

A 01185

Best of luck to this years Competitors

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OUTPUT FILE AT 100% FOR FINAL SIZE OF 25-3/8" W x 6" H.

A 01186

Dublin Coupon Book

A05964

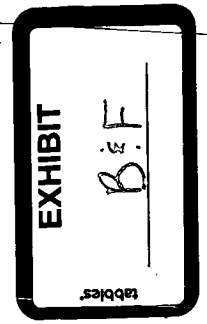
AIPC Brand Health Tracking Study
Wave I

Prepared for Powerpact/AIPC

Prepared by Synovate

Job number H028

Date March, 2004



synovate

Research reinvented

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Background

AIPC owns several very well-known brands of dry pasta and produces a substantial portion of the private label pasta in the category. The company's presence in branded products has been driven by acquisitions of regional brands. AIPC typically holds the number one or two share position in each of its regions with its biggest competitors being Barilla (the only national brand of pasta), New World Pasta, and private label brands.

To date, AIPC has not conducted a comprehensive study to understand the perceptions of its key brands. Thus, the company has commissioned a marketing research study to better understand consumer perceptions in each of eight market areas:

- Muellers (Muellers North, Muellers South and total Muellers)
- Golden Grain
- Martha Gooch/R&F (as well as R&F separately)
- Anthony's
- Ronco
- Luxury.

The findings in this deck represent the first of three waves of consumer research aimed at monitoring the health of the AIPC brands.

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Objectives

The overall study objectives are to:

- Understand the drivers of brand choice in the dry pasta category (particularly outside of price).
- Gain insight into how each of the key AIPC brands are perceived relative to competitors (particularly Barilla, New World Pasta, and private label) on these drivers
- Measure overall awareness and ad awareness of AIPC brands in relation to competitive brands
- Ascertain attitudes toward low-carb pasta products given the recent trends toward low-carb diets as well as awareness and usage of low-carb pasta brands (including the new AIPC products, as they are introduced).

As a result of this research, AIPC would like to gain the insight required to either confirm the relevance of its unified brand positioning and/or make changes to the positioning/messaging. To the extent that there are relevant regional brand differences that could be executed efficiently, AIPC will consider these as well.

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Methodology

A total of 1709 interviews were completed among female primary grocery shoppers. In order to qualify, respondents were required to:

- Be between the ages of 25 and 54.
- Have annual household incomes of $25,000 or more
- Be, at a minimum, a high school graduate
- Have purchased dry pasta from a grocery store in the past 6 months.

Interviews were conducted in eight geographic areas, each representing the geography in which one of the AIPC pasta brands are marketed:

- Muellers (600 interviews)
  - Data is additionally examined across Muellers North (300 interviews) and Muellers South (300 interviews) regions
- Golden Grain (300 interviews)
- Martha Gooch/R&F (300 interviews)
  - Data is also examined within R&F specifically
- Anthony's (300 interviews)
- Ronco (114 interviews)
- Luxury (95 interviews)

Questionnaires were administered via the Internet with members of the Synovate Consumer Opinion e-Panel. Interviews were conducted from February 3-9, 2004.

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Attitudes Toward Diet, Health, and Carbohydrates

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Summary: Attitudes Toward Diet, Health, and Carbohydrates

The vast majority of consumers know that eating a balanced diet is very important for their health, but most struggle to eat right. Pasta addresses consumers' needs for a food that is a good value, is quick and easy to prepare, is versatile, and is a meal their whole family enjoys.

- Though price is reported to be an important factor in the category, taste and quality are critical. Additionally, only a minority of consumers feel that all brands of pasta are of the same quality.

In terms of current practices regarding reduced-carb diets:

- One in ten consumers is currently on a low-carb diet.
- One in four intends to begin a low-carb diet in the next 12 months.
- Roughly four in ten consumers is reducing carbohydrates for themselves or someone in their household.
- Three in ten consumers would purchase a low/reduced carb pasta in the future.

Though Low Carb Dieters claim to be attempting to serve less pasta, in an average week they serve the same number of pasta dishes to their family as Total Respondents.

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Agreement with Health, Diet, and Carbohydrate Statements – % Top Two Box

The vast majority of consumers agree that eating a well-balanced diet is important to their overall health and well-being and that they try to eat right but don't always do so.

And, in line with recent press regarding the obesity in America, a full six in ten consumers report that they or someone in their household are overweight.

It appears that, despite all the recent news about the impact of carbohydrates in the diet, consumers still need some education on the subject.

- Three to four in ten consumers say they are confused about the difference between 'good' and 'bad' carbohydrates.
- One in four say they've heard carbs are bad for them but they are unsure what to do about it.

Consumers living in the area in which the Golden Grain brand is sold (West Coast), are more health-conscious.

- These individuals are more likely than those in other market areas to say that both their health and eating a balanced diet are important to them.
- They are also somewhat more educated on the subject of carbohydrates.
  - They are less likely to be confused about the difference between good and bad pastas or to have heard that carbs are bad for them but be unsure what to do about it.

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Agreement with Health, Diet, and Carbohydrate Statements – % Top Two Box (continued)

	% Agree Strongly/Somewhat									
	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
I believe that eating a balanced diet is very important for my overall health and well-being	88	86	90	90	89	82	91 F	94 AB	93 ABE	92 AB
I try to eat right but don't always	78	77	80	75	79	73	81	83	79	82
I am, and/or another household member is, overweight	59	57	62	58	65 ABJ	66	65	62	61	58
My health is very important to me so I watch my diet closely and exercise regularly	48	46	52	51	49	53	48	44	57 ABE HJ	49
I eat what I like and don't constantly watch my diet	49	51 D	47	41	48	39	51 F	56 D	49	52 D
I want to lower the amount of carbs in my diet but I don't want to give up pasta	50 EI	51 EI	49 I	48	44	43	44	54 EI	42	49 I
I'm confused about the difference between "good" and "bad" carbs	38 I	37	40 I	32	34	37	33	43 I	30	37 I
I have heard that carbs are bad for me but I'm not sure what to do about it	27 I	29 CI	23 I	22	23 I	25	23	32 CI	16	24 I
I find myself serving less pasta for my family since I'm on a low carb diet	22	19	26 BI	27 BI	24	27	23	20	19	23

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Q. 19B Below are several statements that may or may not describe you. For each statement, please indicate how much you agree or disagree with it. A011292
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

Agreement with Statements Regarding Pasta -- % Top Two Box

Nine in ten or more consumers agree that pasta is a good value, is quick and easy to prepare, is versatile, and is a meal their whole family enjoys.

- Only one-third believe that all brands of pasta are of the same quality.
- Very few (roughly 15%) feel that pasta fits into a low-carb diet.

% Agree Strongly/Somewhat

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
Pasta is a good value for the money	95	94	95	96	94	91	95	96	95	94
Pasta is a quick and easy meal to prepare	94	94	94	94	94	92	95	97	95	94
Pasta is versatile: I can make lots of different dishes with pasta	91	90	92	94	95 ABJ	94	95	94	94 J	90
Pasta is a meal my whole family enjoys	90 J	91 J	89	90	92 J	89	93	92	89	86
I feel good about serving my family pasta	84 J	84 J	83	87 J	82	81	82	89 EIJ	82	78
Pasta is a wholesome and nutritious meal	74	77 C	70	72	71	67	73	77	74	72
Pasta is better for my family than pizza and other fast food meals	67	66	69	73	66	63	67	67	67	66
Pasta is part of a well-balanced diet	68	69	66	74 EIJ	65	66	64	69	65	65
Pasta inspires me to create dishes my whole family likes	63	62	64	68	60	57	61	62	61	61
Pasta is a low fat, sodium free, cholesterol free food	58	57	59	64	56	44	60 F	61	56	56
The pasta I use is the brand that's on sale	58 E	58	57	59	51	57	49	55	63 EJ	53
All brands of pasta are the same quality	34 J	33 J	36 J	36 J	32 J	34	31	34	31	25
Pasta fits into a low-carbohydrate diet	15 EI	17 CEI	11	18 CEI	11	9	11	18 CEI	9	14 I

Q. 13 Using the scale below, please indicate if you agree or disagree with the following statements about pasta.
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Frequency of Purchasing/Using Pasta

Consumers in the Muellers North area report eating significantly more pasta.

- Those in the area served by the Ronco brand consume somewhat less than those in other market areas.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600) A %	(300) B %	(300) C %	(114) D %	(300) E %	(79)* F %	(221) G %	(95)* H %	(300) I %	(300) J %
Mean Number of Packages Purchased Per Year	26.1 EIJ	27.6 CDE IJ	23.5 I	22.6	23.0	29.7 G	20.5	27.3 EIJ	20.9	21.4
Mean Number of Packages Purchased Per Occasion	2.5 DEH	2.7 CDE H	2.2 D	2.0	2.1	2.2	2.1	2.1	2.5 CDE H	2.6 CDE H
Mean Number of Packages Used Past 30 Days	3.7 DEIJ	4.0 CDE IJ	3.2 D	2.6	3.1	3.7 G	2.8	3.4 D	3.1 D	3.0
Mean Number of Pasta Meals Prepared in Average Week	1.6 D	1.7 CDE J	1.5	1.4	1.5	1.6 G	1.4	1.5	1.6	1.5

Q. 17A How often would you say you purchase packaged dry pasta?
Q. 17B How many bags or boxes do you buy each time you purchase dry pasta?
Q. 18 How many packages of dry pasta would you say your household USED in the past 30 days?
Q. 19A In an average week, how many meals are prepared, either by you or someone else in your household, that include packaged dry pasta?
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Amount of Pasta Eating Now Vs. 6 Months to One Year Ago

Though the majority of consumers report eating the same amount of pasta as they did six months to one year ago, three in ten report eating less.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
More pasta	7	8	5	4	7	9	6	7	5	6
The same amount of pasta	62	63	58	62	62	68	59	64	66 C	63
Less pasta	30	27	35 B	34	29	22	32 F	26	29	29
Not sure	2	2	2	-	2	1	2	2	1	2

Q. 24 Compared to 6 months to a year ago, would you say you are eating...
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Pasta Attribute Most Important

When asked to name the most important characteristic in choosing a brand of pasta, consumers report that taste and price are most important, followed by quality.

- Price is stated to be the most important element.
  - Consumers in all markets except Muellers North rank price as more important than taste.
  - However, as will be shown later, price is not a key driver in overall brand satisfaction ratings.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
Characteristic Ranked Most Important....										
Price	30	28	33	31	34 B	37	33	29	35 B	33
Taste	30	33 CEI	25	26	25	23	25	27	25	30
Quality	18	18	19	19	18	19	17	16	18	19
Cut of pasta	9	10	8	10	11 J	6	12	13 J	12 CJ	6
Amount of carbohydrates (carbs)	5	4	7 I	7	6 I	8	6	5	3	4
Brand name	5	4	6	4	5	5	5	4	4	5
Size of package	3 E	3 E	2	4 E	1	3	0	5 E	2	3
Type of package	0	0	-	-	-	-	-	-	-	0

Q. 16 Below is a list of characteristics that you may or may not consider when purchasing pasta. Please rank each characteristic on how important that characteristic is to you when making a decision to purchase a brand of pasta.
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Current/Past Use of Low-Carb Diets

Roughly one in ten consumers reports being on a low-carb diet. An equal number reports having been on a low carb diet and failed.

- It is important to remember respondents in this test were screened to have purchased a dry packaged pasta in the past 6 months. Any consumer who on a strict, low carb diet for a prolonged period of time would not be included in this study. Thus, the percentage of people reported to be on a low-carb diet may be understated.

	% Aware of Diet									
	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
I have never tried a low-carb diet	67 E	71 CDE	60	61	61	56	63	62	68 C	66
I am currently on a low-carb diet	10	9	13 J	11	13 BJ	8	15 F	12	10	8
I tried a low-carb diet and was not successful	10	9	13 HI	10	9	6	10	5	7	9
I lost weight on a low-carb diet and was not able to maintain my weight	6	6	7	9	10 AB	18 G	8	13 ABC	7	11 AB
I lost weight on a low-carb diet and am maintaining my weight	6	6	7	10	6	13 G	4	8	7	6

Q. 21A Please indicate which statement best describes your current situation.
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Likelihood to Start Low-Carb Diet in Next 12 Months

Roughly one in four consumers intends to begin a low-carb diet in the next 12 months.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
Top 2 Box (Net)	22	23	22	24	24	24	24	28 I	20	22
Extremely likely	12	12	11	17 C	11	10	12	14	12	12
Very likely	11	11	11	7	13 DI	14	13	15 DI	8	10
Somewhat likely	19	19	20	18	20	24	18	29 ABC DEI	15	24 AI
Bottom 2 Box (Net)	59 H	59 H	58 H	58 H	56 H	52	57	42	65 ACE HJ	24 H
Not very likely	25 EH	26 H	25	20	20	23	19	17	25	24
Not at all likely	33	33	33	38 H	36 H	29	38	25	40 ABC HJ	24

Q. 21B How likely would you be to start a low-carb diet in the next 12 months?
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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A011298

Whether Currently Reducing Carbohydrates for Self or Family

Though (as shown previously) only one in ten consumers reports being on a low carb diet, a much greater number state that they are currently reducing carbohydrates for themselves or their family.

- Roughly four in ten consumers are reducing carbohydrates, with roughly half of the dieting being just one person in the household and half being across the entire household.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
Yes (Net)	42	41	43	44	44	46	43	39	39	40
Yes - myself only	17	17	17	18	18	16	19	19	15	20 I
Yes - family (not myself)	3	3	4	4	5	8	4	3	5	3
Yes - both myself and family	21	21	21	21	21	22	21	17	19	17
No	58	59	57	56	56	54	57	61	61	60

Q. 22 Are you currently reducing the amount of carbohydrates for yourself or your family?
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Past Usage of Low or Reduced Carb Pastas

One in ten consumers report having ever tried a low or reduced carb pasta.

- No one low carb pasta brand dominates the market.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
	A	B	C	D	E	F	G	H	I	J
Whether Ever Tried Low or Reduced Carb Pasta										
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
Yes	8	8	7	6	9	4	11 F	11	6	8
No	92	92	93	94	91	96 G	89	89	94	92
Brands of Reduced Carb Pasta Ever Tried^										
Base: Those Who Ever Tried Reduced Carb Pasta	(45)*	(24)**	(20)**	(7)**	(28)**	(3)**	(25)**	(10)**	(19)**	(23)**
Atkins	9									
Darielle	7									
Ketto	7									
Mueller	6									
Light & Fluffy	6									
All other store brands	3									
All other mentions	16									
None/nothing	7									
Refused/No Answer	3									
Don't Know	38									

Q. 23A Have you ever tried a low-carb or reduced carb pasta?
Q. 23B What brands of low-carb or reduced carb pasta have you ever tried?
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
** Base size too small to analyze.
^ Only mentions of 3% or more shown.

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Likelihood of Purchasing Low or Reduced Carb Pasta in Future

Roughly three in ten consumers report that they definitely or probably would purchase a low or reduced carb pasta in the future.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
Top 2 Box (Net)	32	31	33	38	30	29	31	38	29	34
Definitely would buy (5)	14	14	15	18	14	9	16	12	12	13
Probably would buy (4)	18	18	18	20	16	20	14	26 ABC EI	18	20
Might or might not buy (3)	33	32	35	33	30	33	29	39 E	31	32
Bottom 2 Box (Net)	35 H	37 H	32	29	40 CDH	38	41	23	40 CDH	34 H
Probably would not buy (2)	18	18	18	15	25 ABC DH	29	23	15	21	20
Definitely would not buy (1)	17 H	19 CHJ	14	14	15 H	9	18 F	8	19 CHJ	14
Mean	2.9	2.9	3.0 I	3.1 EI	2.9	2.9	2.9	3.2 ABE I	2.8	3.0 I

Q. 23C How likely would you be to buy a low carb or reduced carb pasta in the future?
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Reduced Carb Pasta Attribute Most Important

Taste is, by far, the most important attribute for a reduced carb pasta to possess.

	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600)	(300)	(300)	(114)	(300)	(79)*	(221)	(95)*	(300)	(300)
	A	B	C	D	E	F	G	H	I	J
	%	%	%	%	%	%	%	%	%	%
Feature Ranked Most Important....										
The reduced carb pasta I buy should taste as great as the regular pasta	78%	80%	76%	75%	75%	72%	76%	77%	80%	76%
The reduced carb pasta I buy has the same smooth and creamy texture of regular pasta	11%	11%	12%	13%	12%	13%	12%	15%	12%	13%
The reduced carb pasta I buy should have the lowest amount of carbohydrates	10%	9%	12%	12%	13% BI	15%	13%	8%	9%	11%

Q. 23D Listed below are different features of reduced carb pastas. Based on your impressions or anything you may have seen or heard about reduced carb pastas, please RANK each feature.

Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.

* Caution: small base size.

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Awareness of Brand Name Diets

Virtually all consumers are aware of the Atkins diet. The vast majority are aware of the South Beach diet.

- Awareness of the Zone and Sugarbusters is lower than awareness of Atkins and South Beach.
  - Sugarbusters has extremely strong awareness in the Luxury market area.

	% Aware of Diet									
	Muellers				Martha Gooch/R & F					
	Total	Muellers North	Muellers South	Ronco	Total	Martha Gooch	R & F	Luxury	Golden Grain	Anthony's
Base: Total Respondents	(600) A	(300) B	(300) C	(114) D	(300) E	(79)* F	(221) G	(95)* H	(300) I	(300) J
	%	%	%	%	%	%	%	%	%	%
Atkins	96	96	96	96	98	99	97	98	97	97
South Beach	81 HJ	78	85 BHJ	83 H	86 ABH J	80	89 F	72	82 HJ	76
Zone	52	53	51	54	55 H	53	56	43	64 ABC DEH	62 ABC EH
Sugarbusters	33	28	43 BIJ	66 ABC EIJ	36 BIJ	27	40 F	95 ABC DEIJ	28	28
None of the above	4	4	4	2	2	1	3	1	3	3

Q. 20 Please indicate which of the following diets you have heard of:
Columns tested: A/B/C/D/E/F/G/H/I/J. Capital letters indicate differences at the 90% confidence level.
*Caution: small base size.

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Perceptions Regarding Amount of Pasta Eaten – Among Current Low Carb Dieters

Those who are currently on a low carb diet perceive that their usage of pasta has decreased greatly in the recent past.

	Total Muellers		Muellers South		Golden Grain		Martha Gooch/R & F		R & F	
	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter
Base: Total Respondents	(600)	(61)*	(300)	(38)*	(300)	(30)*	(300)	(39)*	(221)	(33)*
	%	%	%	%	%	%	%	%	%	%
I find myself serving less pasta for my family since I am on a low carb diet^	22	77	26	87	19	77	24	82	23	79
Amount of Pasta Eating Now vs. 6 Months to 1 Year Ago										
More Pasta	7	2	5	-	5	3	7	-	6	-
Same Amount of Pasta	62	11	58	5	66	19	62	5	59	6
Less Pasta	30	84	35	92	29	77	29	92	32	91
Not Sure	2	3	2	3	1	-	2	3	2	3

Q. 19B Below are several statements that may or may not describe you. For each statement, please indicate how much you agree or disagree with it.
Q.24 Compared to 6 months to a year ago, would you say you are eating...
Markets not listed have small base size for Current Low Carb Dieter
^ % Top Two Box Score Listed
* Caution: small base size.

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Frequency of Purchasing/Using Pasta – Among Current Low Carb Dieters

However, when asked specifics about how much pasta is consumed in the home, usage of pasta is among Low Carb Dieters, in many cases, similar to that of Total Consumers.

- Importantly, the mean number of pasta meals prepared per week (an easy number for consumers to conceptualize and report) does not decrease among those on low carb diets.

	Total Muellers		Muellers South		Golden Grain		Martha Gooch/R & F		R & F	
	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter
Base: Total Respondents	(600)	(61)*	(300)	(38)*	(300)	(30)*	(300)	(39)*	(221)	(33)*
	%	%	%	%	%	%	%	%	%	%
Mean # Times Pasta Purchased/Year	26.1	22.9	23.5	18.9	20.9	25.2	23.0	14.4	20.5	14.1
Mean # Packages/Purchase	2.5	2.7	2.2	2.1	2.5	2.3	2.1	2.8	2.1	2.9
Mean # Packages Used Past 30 Days	3.7	3.6	3.2	2.5	3.1	3.0	3.1	2.5	2.8	2.6
Mean # Pasta Meals Prepared/Week	1.6	1.7	1.5	1.4	1.6	1.6	1.5	1.4	1.4	1.4

Q.17A How often would you say you purchase packaged dry pasta?
Q.17B How many bags or boxes do you buy each time you purchase dry pasta?
Q.18 How many packages of dry pasta would you say your household USED in the past 30 days?
Q.19A In an average week, how many meals are prepared, either by you or someone else in your household, that include packaged dry pasta?
Markets not listed have small base size for Current Low Carb Dieter
* Caution: small base size.

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Agreement with Statements Regarding Pasta -- % Top Two Box – Among Current Low Carb Dieters

Low carb dieters are much more likely to have concerns about the wholesomeness and nutrition content of pasta and are less likely to feel good about serving it to their family.

	Total Muellers		Muellers South		Golden Grain		Martha Gooch/R & F		R & F	
	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter
Base: Total Respondents	(600)	(61)*	(300)	(38)*	(300)	(30)*	(300)	(39)*	(221)	(33)*
	%	%	%	%	%	%	%	%	%	%
I feel good about serving my family pasta	84	70	83	66	82	68	82	56	82	52
Pasta is a wholesome and nutritious meal	74	59	70	55	74	61	71	51	73	52
Pasta is part of a well-balanced diet	68	55	66	53	65	45	65	36	64	39
Pasta fits into a low-carbohydrate diet	15	5	11	3	9	3	11	-	11	-

Q.13 Using the scale below, please indicate if you agree or disagree with the following statements about pasta.
Markets not listed have small base size for Current Low Carb Dieter
* Caution: small base size.

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Pasta/ Reduced Carb Pasta Attribute Most Important -- Among Current Low Carb Dieters

When Low Carb Dieters are deciding which brand of pasta to purchase, the amount of carbohydrates is generally the most important feature.

- However, it is important to remember that taste is still a key feature. Once consumers are asked what is important when choosing a reduced carb pasta, delivering on taste is once again critical.
  - AIPC may wish to consider that the relevant 'bursts' or 'call-outs' on package fronts may need to change as the category evolves. At first, when there are few low carb brands on the market, it may be most relevant to consumers to be told that the product has few carbs.
  - However, once consumers become used to purchasing low carb pasta and once there are many brands for them to choose from, then taste is likely to become a key factor in deciding between brands.

	Total Muellers		Muellers South		Golden Grain		Martha Gooch/R & F		R & F	
	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter	Total	Current Low Carb Dieter
Base: Total Respondents	(600)	(61)*	(300)	(38)*	(300)	(30)*	(300)	(39)*	(221)	(33)*
	%	%	%	%	%	%	%	%	%	%
Most Important Characteristic When Deciding To Purchase Brand of Pasta										
Price	30	31	33	26	35	32	34	15	33	18
Taste	30	22	25	21	25	13	25	28	25	27
Quality	18	12	19	13	18	29	18	10	17	12
Cut of pasta	9	8	8	3	12	13	11	5	12	6
Amount of carbs	5	25	7	37	3	10	6	31	6	27
Brand name	5	-	6	-	4	3	5	8	5	6
Size of package	3	2	2	-	2	-	1	3	0	3
Type of package	0	-	-	-	-	-	-	-	-	-
Most Important Feature of Reduced Carb Pasta										
Tastes as great as the regular pasta.	78	53	76	53	80	68	75	44	76	48
Same smooth and creamy texture of regular pasta.	11	13	12	11	12	3	12	5	12	3
Lowest amount of carbohydrates.	10	34	12	37	9	29	13	51	13	48

Q.16 Below is a list of characteristics that you may or may not consider when purchasing pasta. Please rank each characteristic on how important that characteristic is to you when making a decision to purchase a brand of pasta.
Q.23D Listed below are different features of reduced carb pastas. Based on your impressions or anything you may have seen or heard about reduced carb pastas, please RANK each feature.
Markets not listed have small base size for Current Low Carb Dieter
* Caution: small base size.

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Total Muellers

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Total Muellers – Summary

Within the Total Muellers sales region, there is fierce competition among the pasta brands.

- Barilla and Muellers are the leading brands in the markets, and are clearly each others' biggest competitors. Taken collectively, New World Pasta and Store Brands also perform as well as Barilla and Muellers.

However, New World Pasta brands and Barilla tend to be purchased more often by heavy category users, whereas Muellers is purchased more often by light category users.

- This could be a potential problem for the Muellers brand, which is now required to repeatedly attract new and/or infrequent users to the brand.
    - Converting some of the heavy category users to be loyal to the Muellers brand could result in large pay-offs for the brand.

Consumers are very satisfied with the Muellers brand of pasta.

- However, consumers issue even slightly stronger ratings to the Barilla brand.

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Total Muellers: Brand Image Analysis

Though value for the money is moderately important to consumers, having a low price alone is relatively unimportant.

- Most important are elements related to offering a Consistent Taste & Texture. Tasting best and having a good texture are most critical.

Muellers and Ronzoni have virtually identical brand images.

- Both are perceived as well-known brands, America's favorite brand, a brand mom/family used and ones that are offered in a variety of shapes.
- This could be a potential problem for the Muellers brand which may be vulnerable if New World Pasta decides to increase spending behind Ronzoni in the Total Muellers market.

Barilla is rated highly on several very important elements: tastes best, high quality, and favorite brand regardless of price.

- It is also strong on the moderately important attributes of being Italy's #1 pasta, being authentic Italian, and is always Al Dente.

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Total Muellers: Demographic Profile by Category Usage

Within the Muellers sales geography, heavy users of dry pasta tend to be older, married, and have more children in the household.

- In addition, annual household incomes are higher for heavy users than for light users.
- The female head of household is especially likely to be White and is more likely to work part-time.

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Total Muellers: Demographic Profile by Category Usage (continued)

	Total Muellers	Category Usage: Heavy	Medium	Light
Base: Total Respondents	(600)	(150)	(181)	(250)
	A	B	C	D
	%	%	%	%
Mean Age	40.6	41.4 D	40.6	40.0
Marital Status				
Married	75	78 D	81 D	70
Single (Net)	25	22	19	30 BC
Never married	15	10	8	19 BC
Divorced/separated	10	11	9	10
Widowed	1	1	2 D	-
Employment of Female Head of Household				
Employed (Net)	78	83	77	77
Full time	67	69	66	68
Part time	11	14 D	11	8
Not Employed (Net)	19	17	22	19
Retired	1	1	1	1
Homemaker	16	14	19	16
Other	2	3	2	2
Not specified	3	-	2	4 B
Education				
High School Graduate	16	18	16	15
Some College	26	30 D	30 D	22
College Graduate	38	35	36	42
Post Graduate	20	17	18	21
Mean Household Income (in 000s)	79.3	81.9 D	80.2	76.2
Mean Household Size	3.1	3.6 CD	3.3 D	2.8
Mean Number of Children in Household Under 18	1.7	2.0 CD	1.6	1.6
Race of Female Head of Household				
White	85	94 CD	88 D	79
Non-White (Net)	12	5	11 B	16 B
Black	8	4	6	11 BC
Asian/Pacific Islander	0	-	-	1
Other	4	2	5	3
Not specified	3	1	2	5 BC

Q. S3: Please indicate your age.
Q. S6: What is the highest level of education you have completed?
Q. S5: Which of the following best describes your total yearly household income?
Marital status, employment, household size, number of children, and race of female head of household obtained from panel data.
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.

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Total Muellers
Advertising Awareness and Recall

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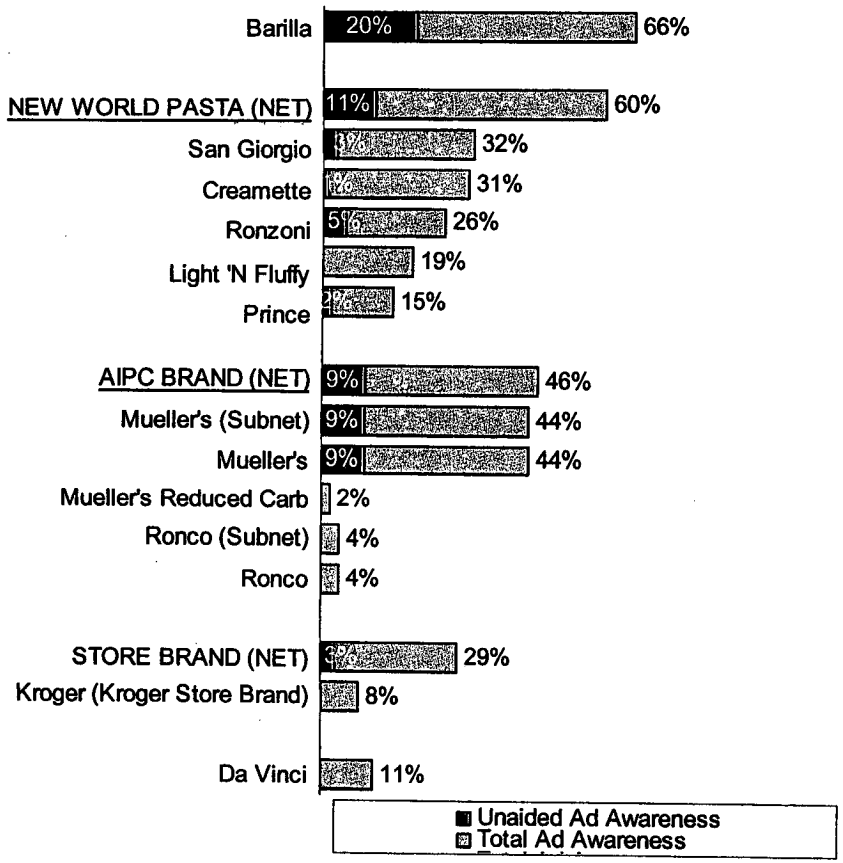
Total Muellers: Ad Awareness

Barilla is the individual brand with the highest reported ad recognition, followed by Muellers.

Awareness of advertising for each of the individual New World Pasta brands is much lower than Barilla and Muellers.



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Q. 2 Which brands of packaged dry pasta have you seen or heard advertised in the PAST MONTH?
Q. 4 You may have already mentioned dry pasta brands you have seen or heard advertised. Using the list below, please indicate ALL dry pasta brands have you EVER HEARD OR SEEN ADVERTISED, including those brands you may have already mentioned.
Only mentions of 7 or more in either column shown except for AIPC brands which are all listed.

A011314

Total Muellers: Where Saw Advertisement

There are several brands of pasta which consumers remember seeing television ads for: Barilla, Prince, Ronzoni, and San Giorgio.

- Muellers, Creamette, and Light 'N Fluffy all receive roughly equal mentions for ad placements on TV, in magazines, and in newspapers.
- Store Brands are primarily advertised in newspapers.

	Muellers	Barilla	Creamette	Light N' Fluffy	Prince	Ronzoni	San Giorgio	Store Brand (Net)	Kroger	Publix	Food Lion	Da Vinci
Base:Those Aware of Advertisement	(262) A %	(395) C %	(185) F %	(114) G %	(84)* I %	(152) J %	(187) K %	(169) M %	(46)* N %	(38)* O %	(33)* P %	(64)* Q %
TV	39 FNO PQ	74 AFG JKN OPQ	28 NOP	32 NOP Q	65 AFG JKN OPQ	49 AFG NOP Q	47 AFG NOP Q	15	11	9	8	20
Newspaper	31 CFI	15	23 CI	28 CI	12	25 CI	25 CI	49	47 ACF GJK Q	38 CFI Q	48 ACF GJK Q	21
Magazine	28 CIK NOP	12 NP	27 CIK NOP	28 CIK NOP	12 NP	22 CIN OP	19 CNO P	4	-	4	-	27 CIN OP
Friend/relative/business/associate	4 K	3	4 K	4 K	3	4 K	1	9	11 ACF GJK	8 K	2	6 K
Radio	2	11 AFG JKN OPQ	2	-	6 AFG	4 G	5 AFG	3	3 G	2	-	1
Other	5	3	5	5	6	3	5	21	18 ACF GJK Q	19 ACF GJK Q	14 ACF GJK	6
Not sure	17 C	7	21 CI	19 C	12	14 C	16 C	24	19 C	25 CI	31 ACIJ K	29 ACIJ K

Q. 5A For each brand you have heard or seen advertised, please indicate where you saw or heard the advertising for each brand.
Q. 5B What other place did you see or hear [INSERT BRAND] advertised?
Columns tested: A/C/F/G/I/J/K/M/N/O/P/Q. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.
Only mentions of 3% or more in any column shown.

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Total Muellers: Ad Recall and Communication

The one most memorable element of any pasta ad is Prince's 'Spaghetti Day' storyline. 35% of consumers aware of Prince ads specifically mention this element. This is extremely high unaided recall for a specific ad element.

No element of Muellers' advertising is particularly memorable to consumers.

Among those aware of a Barilla ad, roughly one in ten consumers remember that it features authentic Italian pasta.

Light 'N Fluffy ads are remembered because they communicate that the product is comprised of egg noodles.

Consumers often mention that ads for store brands are price-related, particularly related to sale items and that the ads were in stores.

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Total Muellers: Ad Recall and Communication (continued)

	Muellers	Barilla	Creamette	Light N' Fluffy	Prince	Ronzoni	San Giorgio	Store Brand (Net)	Kroger	Publix	Food Lion	Da Vinci
Base:Those Aware of Advertisement	(262)	(395)	(185)	(114)	(84)*	(152)	(187)	(169)	(46)*	(38)*	(33)*	(64)*
	A	C	F	G	I	J	K	M	N	O	P	Q
	%	%	%	%	%	%	%	%	%	%	%	%
AD RECALL (NET)	17	28	11	17	48	15	22	33	25	28	26	20
TV/Television commercials	2	7	3	6	9	3	5	2	3	2	-	3
Store flyer	0	-	1	1	-	2	1	10	3	2	12	-
Seeing it in store	4	1	3	6	2	0	3	15	15	15	12	8
Prince Spaghetti Day (Wednesday)	-	-	-	-	35	-	-	-	-	-	-	-
BRAND (NET)	6	10	8	2	3	8	9	2	-	2	-	6
Barilla name/brand name	2	10	7	2	3	5	8	1	-	-	-	6
PACKAGING (NET)	5	2	8	2	-	4	4	3	3	4	4	1
PASTA (NET)	8	17	7	19	6	7	8	2	-	-	-	3
Noodles/egg noodles	1	-	-	13	-	-	-	-	-	-	-	-
Authentic/Italian pasta	-	11	-	-	-	3	4	1	-	-	-	3
PRICE/COST (NET)	18	6	13	7	8	10	11	43	37	32	24	13
Low price	1	-	2	-	-	0	-	10	10	9	6	2
On sale	5	1	4	4	3	3	2	18	19	11	12	6
Coupon	8	4	6	3	2	4	6	5	-	2	-	4
PRODUCT ATTRIBUTES (NET)	3	6	3	29	2	4	2	1	3	-	-	-
Made without yolks	0	-	-	8	-	-	-	-	-	-	-	-
Low carbs	-	-	-	8	-	-	-	-	-	-	-	-
All other product attributes mentions	2	3	2	11	2	4	1	-	-	-	-	-
MISCELLANEOUS (NET)	11	23	11	10	6	11	9	-	16	6	11	5
Al Dente	-	8	-	-	-	-	-	-	-	-	-	1
Miscellaneous store mentions	-	-	-	-	-	-	-	-	10	-	4	-
Don't Know	25	13	25	15	18	24	25	15	16	9	13	28
Refused/No Answer	2	0	2	6	2	2	4	2	3	-	8	3
None/nothing	14	8	15	4	15	18	15	21	11	21	17	21

Q. 5C What SPECIFICALLY do you recall seeing or hearing about the pasta advertising for [INSERT BRAND]?
Columns tested: A/C/F/G/I/J/K/M/N/O/P/Q. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.
Only mentions of 7% or more in any column shown.

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Total Muellers: Recognition of AIPC Brands' Advertising

Roughly one-third of consumers report being aware of an ad featuring a family eating a pasta meal or one that gives quick and easy pasta meal ideas (AIPC's ads).

- However, among those that claim awareness, fewer than one in ten associate the description of the ad with Muellers. Most who name an associated brand credit Barilla with the ad.

One in four consumers who is aware of Mueller's advertising is aware of the 'Mueller's makes the meal, you made the difference' tagline.

Findings are similar across brand user groups. Muellers users are no more likely to remember the ads.

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Total Muellers: Recognition of AIPC Brands' Advertising (continued)

		Past 6 Months Brand Usage				
	Total Muellers	Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
	A	L	M	N	O	P
	%	%	%	%	%	%
Whether Remember AIPC Ad Based on Description						
Base - Those Aware of Any Advertisement	(478)	(250)	(246)	(129)	(98)*	(243)
Yes	37	37	37	30	37	42 N
No	63	63	63	70 P	63	58
Brand Associated with Advertising						
Base - Those Aware of Any Advertisement and Recall AIPC Ad	(175)	(93)*	(91)*	(39)*	(36)*	(102)
Barilla	24	22	25	16	17	25
NEW WORLD PASTA (NET)	18	16	15	33	26	12
Ronzoni	6	3	5	10	20	3
San Giorgio	4	4	3	15	6	2
Prince	4	6	3	3	-	3
Light 'N Fluffy	1	2	1	5	-	2
AIPC BRAND (NET)	10	14	11	7	-	11
Mueller's (Subnet)	9	14	10	7	-	10
Mueller's	9	14	10	7	-	10
Ronco (Subnet)	1	-	1	-	-	1
Ronco	1	-	1	-	-	1
Don't Know/Remember	34	33	37	28	42	38
Aided Awareness of Mueller's Slogan						
Base - Those Aware of Mueller's Advertisement	(262)	(155)	(129)	(74)*	(57)*	(127)
Yes	26	29	26	24	24	28
No	74	71	74	76	76	72

Q. 6A Do you remember seeing a pasta advertisement featuring a family eating a pasta meal or one that gives quick and easy pasta meal ideas?
Q. 6B What brand of pasta was being advertised?
Q. 6C Have you heard of the phrase [INSERT AIPC BRAND] MAKES THE MEAL, YOU MAKE THE DIFFERENCE in a pasta advertisement?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 5% or more in any column shown (for Q. 6B).
Stats testing not appropriate on open-ended questions (Q. 6B).

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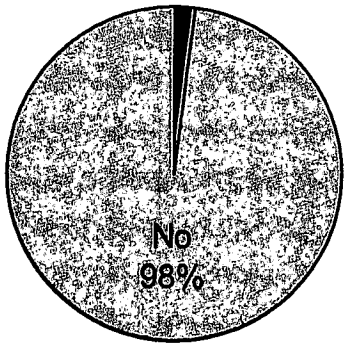
Total Muellers: Aided Awareness of AIPC Website

Only 2% of consumers are aware of www.makesameal.com.

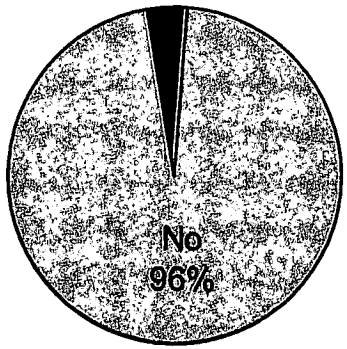
- Only 4% of Muellers users are aware.

Whether Heard About or Visited Makesameal.com

Total Muellers



Past 6 Months Muellers Users



Q. 6D Have you heard about or visited the web site MakesaMeal.com?
NOTE: Base sizes for frequency of visiting AIPC website too small to analyze.

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Total Muellers: Recognition of Barilla Advertising

Roughly one-third of consumers report being aware of an ad featuring authentic Italian recipes (Barilla's ads). This awareness is similar to that reported for the AIPC ad.

- Here, however, consumers clearly associate the ads with Barilla, as over half of those who are aware of the ad based on the description can name Barilla as the sponsor.

		Past 6 Months Brand Usage				
	Total Muellers	Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
	A	L	M	N	O	P
	%	%	%	%	%	%
Whether Remember Barilla Ad Based on Description						
Base - Those Aware of Any Advertisement	(478)	(250)	(246)	(129)	(98)*	(243)
Yes	37	38	45	37	42	42
No	63	62 M	55	63	58	58
Brand Associated With Advertisement						
Base - Those Aware of Any Advertisement and Recall Barilla Ad	(179)	(94)*	(111)	(48)*	(41)*	(102)
Barilla	58	58	63	70	47	57
NEW WORLD PASTA (NET)	12	14	8	15	27	11
San Giorgio	7	6	5	12	11	7
Ronzoni	5	6	4	3	18	3
Da Vinci	2	2	2	3	5	1
AIPC BRAND (NET)	2	2	1	-	-	1
Ronco (Subnet)	1	1	-	-	-	1
Ronco	1	1	-	-	-	1
Mueller's (Subnet)	0	1	1	-	-	-
Mueller's	0	1	1	-	-	-
Don't Know/Remember	17	17	16	7	15	18

Q. 7A Do you remember any type of pasta advertising featuring authentic Italian recipes and pasta from Italy?
Q. 7B What brand was being advertised?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
** Base size too small to analyze.
Only mentions of 5% or more in any column shown (for Q. 7B).
Stats testing not appropriate on open-ended questions (Q. 7B).

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Total Muellers Brand Awareness and Purchase Behavior

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Total Muellers: Brand Awareness

Nearly all consumers are aware of one or more brands of AIPC, New World Pasta, Store Brands, and Barilla pasta.

- However, AIPC (specifically Muellers) has the highest unaided awareness of any single brand.
  - Over half of consumers mention Muellers when asked to name specific brand(s) of packaged dry pasta.
  - Barilla is the brand with the next highest unaided awareness, with four in ten consumers mentioning it when prompted.
- Though most consumers are aware of at least one New World Pasta brand, awareness is divided among three different brands – Creamette, San Giorgio, and Ronzoni.
  - Interestingly, of these three brands Ronzoni has the highest unaided awareness but the lowest total awareness.
  - None of these brands has unaided awareness even close to that of Muellers.

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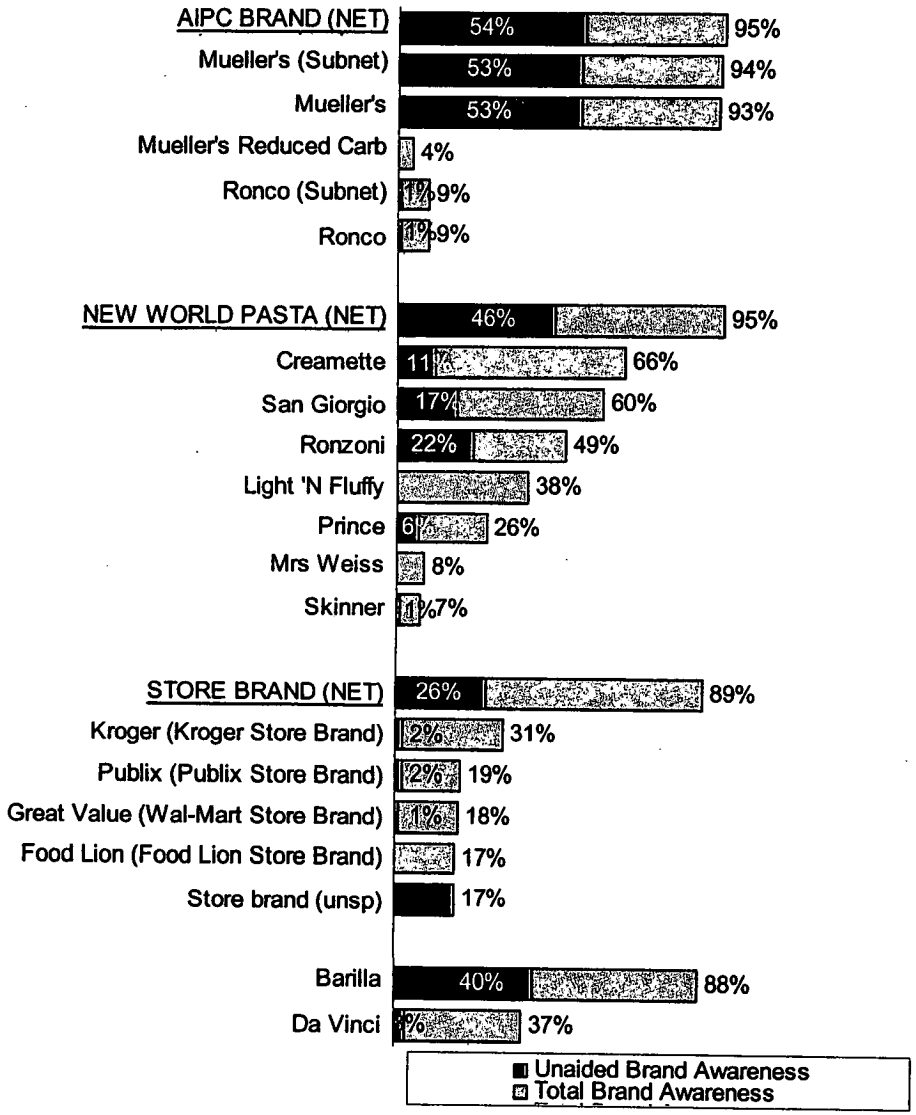
Total Muellers: Brand Awareness (continued)



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Q. 1 Thinking about brands of packaged dry pastas, which pasta brands come to mind?
Q. 3 You may have already mentioned some dry pasta brands you have heard of. Using the list below, please indicate ALL of the following dry pasta brands you have EVER heard of, including those brands you may have already mentioned.
Only brands with mentions of 7% or more in either column shown except for AIPC brands which are all listed. Only store brands with 15% or more total awareness shown.

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Total Muellers: Awareness-To-Purchase Conversion Rates

Awareness-to-purchase conversion rates (or, the percentage of people aware of a brand who have also purchased it in the past 6 months) are virtually the same for AIPC, New World Pasta, Barilla, and Store Brands.

- Muellers and Barilla are the strongest individual brands, followed by San Giorgio.

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Total Muellers: Awareness-To-Purchase Conversion Rates (continued)

	Conversion Rate	Total Brand Awareness	% Purchased Past 6 Months
AIPC BRAND (NET)	56%	95%	53%
Mueller's (Subnet)	55%	94%	52%
Mueller's	56%	93%	52%
Mueller's Reduced Carb	0%	4%	0%
Ronco (Subnet)	22%	9%	2%
Ronco	22%	9%	2%
Ronco Reduced Carb	0%	0%	0%
Golden Grain (Subnet)	0%	0%	0%
Golden Grain Mission	0%	0%	0%
NEW WORLD PASTA (NET)	59%	95%	56%
Creamette	18%	66%	12%
San Giorgio	45%	60%	27%
Ronzoni	41%	49%	20%
Light 'N Fluffy	32%	38%	12%
Prince	15%	26%	4%
Mrs Weiss	0%	8%	0%
Skinner	29%	7%	2%
STORE BRAND (NET)	56%	89%	50%
Barilla	55%	88%	48%

Q. 1 Thinking about brands of packaged dry pastas, which pasta brands come to mind?
Q. 3 You may have already mentioned some dry pasta brands you have heard of. Using the list below, please indicate ALL of the following dry pasta brands you have EVER heard of, including those brands you may have already mentioned.
Q. 8A Which of the following pasta brands have you purchased in the PAST 6 MONTHS?
Only AIPC brands and major competitors listed.
Conversion ratio calculated as follows: % Purchased Past 6 Months/Total Brand Awareness x 100.

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Total Muellers: Past 6 Months Cross-Brand Purchasing

Barilla is Muellers' single biggest competitor. Likewise, Muellers is Barilla's biggest competitor.

	Total Muellers	Past 6 Months Brand Usage				
		Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
Base: Total Respondents	(600)	(311)	(285)	(163)	(122)	(299)
	A	L	M	N	O	P
	%	%	%	%	%	%
NEW WORLD PASTA (NET)	56	58	57	100 LMP	100 LMP	53
San Giorgio	27	26	28	100 LMOP	34 P	24
Ronzoni	20	19	22	25 L	100 LMNP	19
Creamette	12	16 O	13	15 O	8	14
Light 'N Fluffy	12	11	17 L	19 LP	16	12
Prince	4	8 P	6	5	4	3
Skinner	2	3 O	2	1	-	2
Mrs Weiss	0	-	1 L	1	-	0
AIPC BRAND (NET)	53	100 MNO P	51	50	48	57 O
Mueller's (Subnet)	52	100 MNO P	50	50	48	55
Mueller's	52	100 MNO P	50	50	48	55
Mueller's Reduced Carb	0	-	0	-	-	-
STORE BRAND (NET)	50	53 N	47	44	46	100 LMN O
Barilla	48	46	100 LNOP	50	51	45
Da Vinci	6	8	11 NP	6	11 N	7

Q. 8A Which of the following pasta brands have you purchased in the PAST 6 MONTHS?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 7% or more in any column shown except for AIPC brands which are all listed.

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Total Muellers: Brands Purchased Most Recently

When asked what brand of pasta was purchased most recently, Store Brands, New World Pasta Brands, Barilla, and AIPC brands are all mentioned with equal frequency.

- However, New World Pasta brands and Barilla tend to be purchased more often by heavy category users, whereas Muellers is purchased more often by light category users.

		Category Usage		
	Total Muellers	Heavy	Medium	Light
Base: Total Respondents	(600)	(150)	(181)	(250)
	A	B	C	D
	%	%	%	%
STORE BRAND (NET)	28	31	34 D	23
NEW WORLD PASTA (NET)	28	34 D	28	23
San Giorgio	12	17 D	12	9
Ronzoni	10	14 D	11 D	6
Light 'N Fluffy	3	5	3	2
Barilla	26	40 CD	23	20
AIPC BRAND (NET)	24	22	21	29 C
Mueller's (Subnet)	24	22	20	29 C
Mueller's	24	22	20	29 C
Ronco (Subnet)	0	-	0	1
Ronco	0	-	0	1
Da Vinci	2	5 CD	1	2
Not Specified	3	-	3 B	5 B

Q. 9 Which of the following pasta brands have you purchased most recently?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 5% or more in any column shown except for AIPC brands which are all listed.

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Total Muellers: Frequency of Purchasing On Sale or With Coupon

Barilla, San Giorgio, and Kroger brands are most likely to be purchased on sale or with a coupon.

- Publix and Food Lion are least likely to offer sales or coupons.

	Muellers	Barilla	Creamette	Light N' Fluffy	Ronzoni	San Giorgio	Store Brand (Net)	Kroger	Publix	Food Lion	Da Vinci
Base: Those Who Purchased in Past 6 Months	(311) A %	(285) C %	(74)* F %	(72)* G %	(122) J %	(163) K %	(299) M %	(59)* N %	(42)* O %	(41)* P %	(39)* Q %
Frequently	36 G	42 FGJ Q	28	24	29	41 FGJ Q	42	41 GJQ	29	37	23
Occasionally	30 N	30 N	29 N	32 N	32 N	25	24	15	25	25	31 N
Sometimes	18 O	15	30 AC OP	28 AC OP	28 AC OP	22 CO	20	31 AC OP	7	14	35 AC OP
Never	15	13	12	17	11	11	20	13	39 ACF GJK NQ	25 CFJ K	11

Q. 8B For all the brands you have purchased in the past 6 months, please indicate how often you purchase the brand ON SALE OR WITH A COUPON.
Columns tested: A/C/F/G/J/K/M/N/O/P/Q. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.

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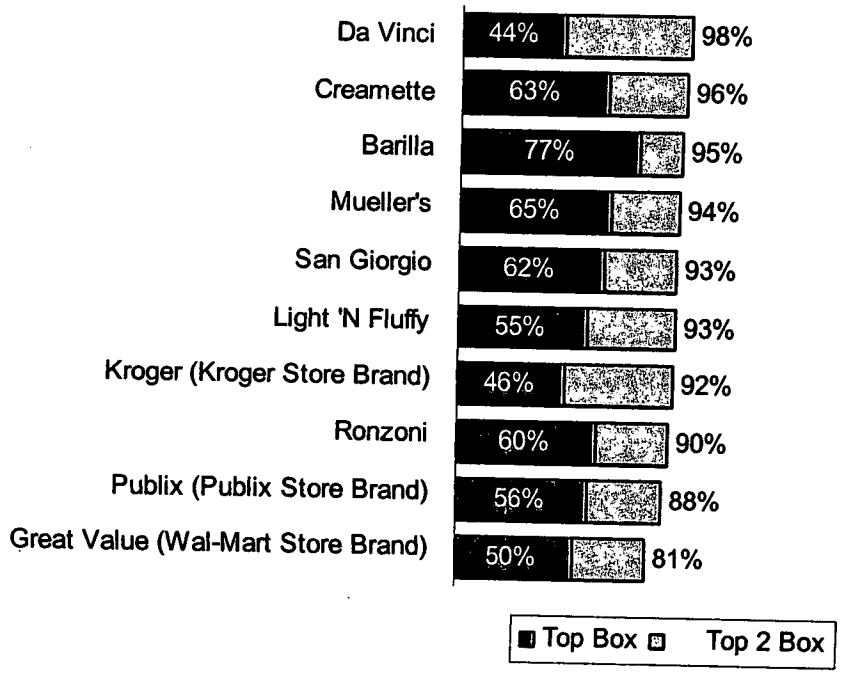
Total Muellers: Overall Brand Satisfaction

Muellers users are very satisfied with the brand's performance. Two-thirds of users issue top box (extremely satisfied) ratings to the brand. Nearly all (94%) issue top two box satisfaction scores.

- Barilla also secures strong satisfaction ratings, particularly top box scores.
  - Barilla is the only name brand (non-store brand) pasta to have top box ratings which exceed that of Muellers.

Overall Brand Satisfaction



Q. 12 Using the 5-point scale provided, please indicate how satisfied you are with each brand listed.
Base: purchased brand in past 6 months.

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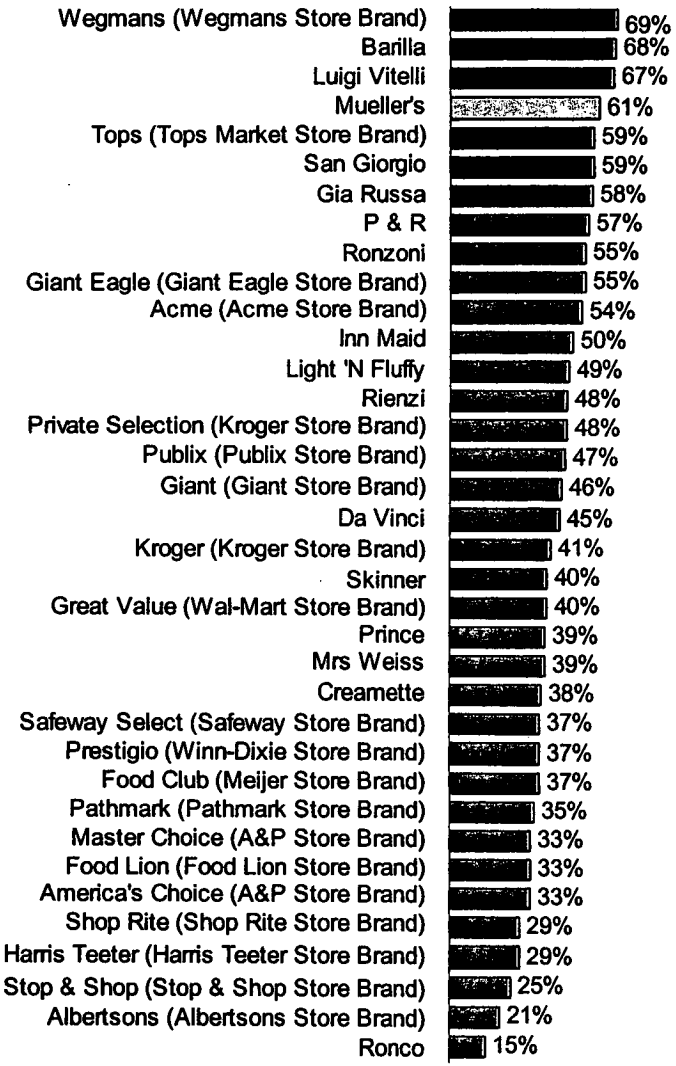
Total Muellers: Future Purchase Intent: % Top 2 Box

Among those aware of the respective brands, Wegmans private label product, Barilla, and Luigi Vitelli secure strong future purchase intent ratings.

- Muellers, Tops, San Giorgio and Gia Russa also secure strong scores.



Q. 11 Using the scale below, please indicate how likely you are to purchase each of the following brands in the next 6 months.
Base: Aware of given brand.

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Total Muellers: One Pasta Brand Plan to Purchase Next

When asked what one brand of pasta they plan to purchase next, a full one-third of consumers say they make their decision at the shelf.

- Among those who do intend to purchase a specific brand, Muellers and Barilla are the names mentioned most often.
- Heavy category users often mention New World Pasta or Barilla as brands they intend to purchase next whereas light category users often mention Muellers.

		Category Usage			Carbohydrate Interest		
	Total Muellers	Heavy	Medium	Light	Curent Low Carb Dieter	Tried Low Carb Pasta	Likely to Buy Low Carb Pasta
Base: Total Respondents	(600)	(150)	(181)	(250)	(61)*	(45)*	(192)
	%	%	%	%	%	%	%
	A	B	C	D	Q	R	S
AIPC BRAND (NET)	17	13	15	23 BC	21	20	21
Mueller's (Subnet)	17	13	15	23 BC	20	20	21
Mueller's	15	12	11	20 BC	9	3	13
Mueller's Reduced Carb	3	1	3	3	11	16	8
Ronco (Subnet)	0	-	-	1	1	-	-
Ronco	0	-	-	1	1	-	-
Barilla	17	27 CD	14	14	16	22	17
NEW WORLD PASTA (NET)	15	17 D	18 D	11	12	9	15
San Giorgio	6	6	7	5	3	3	6
Ronzoni	5	7 D	6 D	2	2	3	4
Creamette	2	4	2	2	5	3	3
Prince	1	-	3 BD	-	-	-	1
STORE BRAND (NET)	13	15 D	19 D	9	3	3	8
Publix (Publix Store Brand)	2	1	4 D	1	-	-	2
Doesn't matter, I make my decision at the shelf	33	24	29	40 BC	42	47	35

Q. 10A Which ONE brand of pasta do you plan to purchase the next time you purchase pasta?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 3% or more in any column shown except for AIPC brands which are all listed.

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Total Muellers: Brand Most Preferred

Barilla is the brand most often mentioned as consumers' preferred brand of pasta, followed closely by Muellers.

- Though store brands have reportedly been purchased nearly as often as the name brands, few consumers name store brands as their preferred pasta brand.
- Again, AIPC appears to have its strongest brand base among light category users.

		Category Usage		
	Total Muellers	Heavy	Medium	Light
Base: Total Respondents	(600)	(150)	(181)	(250)
	%	%	%	%
	A	B	C	D
Barilla	31	39 D	32 D	24
NEW WORLD PASTA (NET)	27	29	29	22
San Giorgio	10	9	9	11
Ronzoni	10	13 D	12 D	6
Creamette	5	5	5	5
Prince	1	2 D	3 D	-
AIPC BRAND (NET)	26	16	21	37 BC
Mueller's (Subnet)	26	15	21	36 BC
Mueller's	26	15	20	36 BC
Mueller's Reduced Carb	0	-	1	-
Ronco (Subnet)	1	0	-	1
Ronco	1	0	-	1
STORE BRAND (NET)	10	10	12	10
Kroger (Kroger Store Brand)	2	1	2	3
Da Vinci	2	2	1	2
Luigi Vitelli	1	3 D	1	-

Q. 10B Of the following brands you have seen or heard of, please indicate which one brand would be your most preferred brand?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 3% or more in any column shown except for AIPC brands which are all listed.

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Total Muellers: General Pasta Brand Attitude

Most consumers recognize that some pasta brands are better than others and feel it is important that they buy one of the better brands.

- Light category users are more likely than heavy users to agree that some pasta brands are better than others, but it's not important which brand of pasta they buy.

		Category Usage			Carbohydrate Interest		
	Total Muellers	Heavy	Medium	Light	Curent Low Carb Dieter	Tried Low Carb Pasta	Likely to Buy Low Carb Pasta
Base: Total Respondents	(600)	(150)	(181)	(250)	(61)*	(45)*	(192)
	A	B	C	D	Q	R	S
	%	%	%	%	%	%	%
Some pasta brands are better than others and it is important that I buy one of those	51	57	50	49	56	52	59
Some brands are better than others, but it's not that important which brand of pasta I buy	27	20	27	30 B	28	42	23
All the pasta brands are about the same, so it doesn't matter to me which one I buy	17	15	20	16	12	3	14
One pasta brand is best and it is important to me to always buy that brand	5	8	4	5	4	3	5

Q. 14B Using the scale below, please indicate how important each of the following statements are to you when considering which brand of pasta to buy.
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Total Muellers: Demographic Profile by Brand Users

Users of Barilla and San Giorgio pasta tend to have higher annual household incomes than users of other brands.
Users of Ronzoni tend to be non-White and have a female head of household who is working full-time.

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Total Muellers: Demographic Profile by Brand Users (continued)

		Past 6 Months Brand Usage				
	Total Muellers	Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
Base: Total Respondents	(600)	(311)	(285)	(163)	(122)	(299)
	A	L	M	N	O	P
	%	%	%	%	%	%
Mean Age	40.6	40.9	40.4	41.0	41.2	40.4
Marital Status						
Married	75	75	75	80	74	77
Single (Net)	25	25	25	20	26	23
Never married	15	14	15	16	13	12
Divorced/separated	10	11 N	10 N	4	13 N	10 N
Widowed	1	1	0	-	-	1
Employment of Female Head of Household						
Employed (Net)	78	78	77	83	87 LMP	78
Full time	67	65	66	69	76 LMP	66
Part time	11	12	11	14	10	12
Not Employed (Net)	19	20 O	20 O	15	12	19 O
Retired	1	1	1	1	-	-
Homemaker	16	17 O	17 O	13	8	16 O
Other	2	2	2	1	3	3
Not specified	3	3	2	2	2	3
Education						
High School Graduate	16	15	18	15	18	15
Some College	26	28	23	23	28	27
College Graduate	38	39	40	41	36	38
Post Graduate	20	18	19	20	19	20
Mean Household Income (in 000s)	79.3	77.2	81.9 LP	86.2 LP	81.1	76.4
Mean Household Size	3.1	3.2	3.2	3.2	3.1	3.3
Mean Number of Children in Household Under 18	1.7	1.7	1.9	1.8	1.8	1.8
Race of Female Head of Household						
White	85	87	89	85	83	88
Non-White (Net)	12	11	9	12	15 MP	9
Black	8	8	5	7	7	5
Asian/Pacific Islander	0	-	0	1	1 LP	-
Other	4	3	3	4	7 LMP	4
Not specified	3	3	2	3	2	3

Q. S3: Please indicate your age.
Q. S6: What is the highest level of education you have completed?
Q. S5: Which of the following best describes your total yearly household income?
Marital status, employment, household size, number of children, and race of female head of household obtained from panel data.
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.

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Total Muellers
Introduction to Pinpoint™

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What is PinPoint™?

Pinpoint™ is Synovate's proprietary analytic approach that provides clients with the consumer insights necessary for the development of a benefits-based brand positioning strategy.

- PinPoint™ links brand image data with brand preference data to provide insight into what is important in the market and how the competitive brand set is performing in relation to this level of importance.

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What is PinPoint™?

Pinpoint™ is designed to answer key strategic questions for a brand.

How do consumers define and differentiate the brands in our category?

What are the drivers of brand preference in our category?

Benefits-Based Positioning Strategy

Is our brand strong on the benefits that matter most to consumers?

What do we need to do to strengthen our brand's competitive position in the marketplace?

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"How do consumers define and differentiate the brands in our category?"

A perceptual map is used to determine how the key competitive brands are currently positioned relative to each other. The map is used to:

- Identify the overall structure of the market.
- Create image groupings that make it easier to understand the "themes" that consumers use to define and differentiate the brands.

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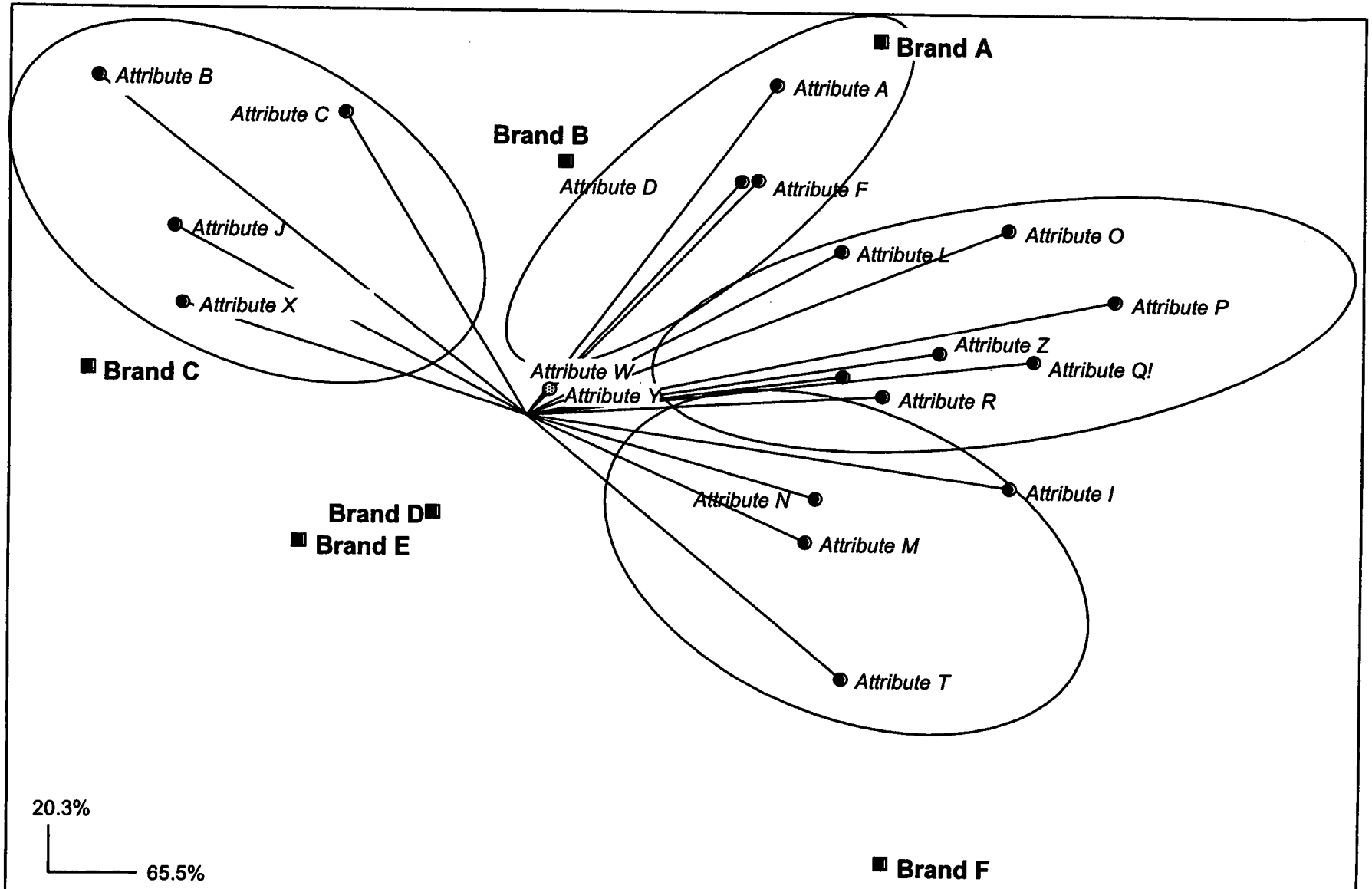
Market Structure



= Correlation < 0.50 2D Fit = 85.9%

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Image Groupings

Identifying the themes that consumers use to define and differentiate brands provides meaningful direction for the development of positioning, advertising and communication strategies.

- The attributes are color-coded according to theme throughout the rest of the Pinpoint™ analysis.

Theme 1 (for example, 'Durable')
- **Attribute A**
- **Attribute D**
- **Attribute F**
- **Etc.**

Theme 2 (for example, 'Disposable')
- **Attribute B**
- **Attribute C**
- **Attribute J**
- **Etc.**

Theme 3 (for example, 'High Tech')
- **Attribute L**
- **Attribute O**
- **Attribute P**
- **Etc.**

Theme 4 (for example, 'Practical')
- **Attribute I**
- **Attribute M**
- **Attribute N**
- **Etc,**

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"What are the drivers of brand preference in our category?"

PinPoint™ uses a proprietary derived importance analysis to uncover the true drivers of brand choice.

- A derived importance analysis is developed to identify the imagery associations that are drivers of brand preference.
- Importance is derived - on a respondent by respondent basis -- by identifying the image attributes that are associated with preferred and non-preferred brands.
  - The use of a derived importance analysis will uncover the more personal and/or emotional - less rational - reasons for brand preference.

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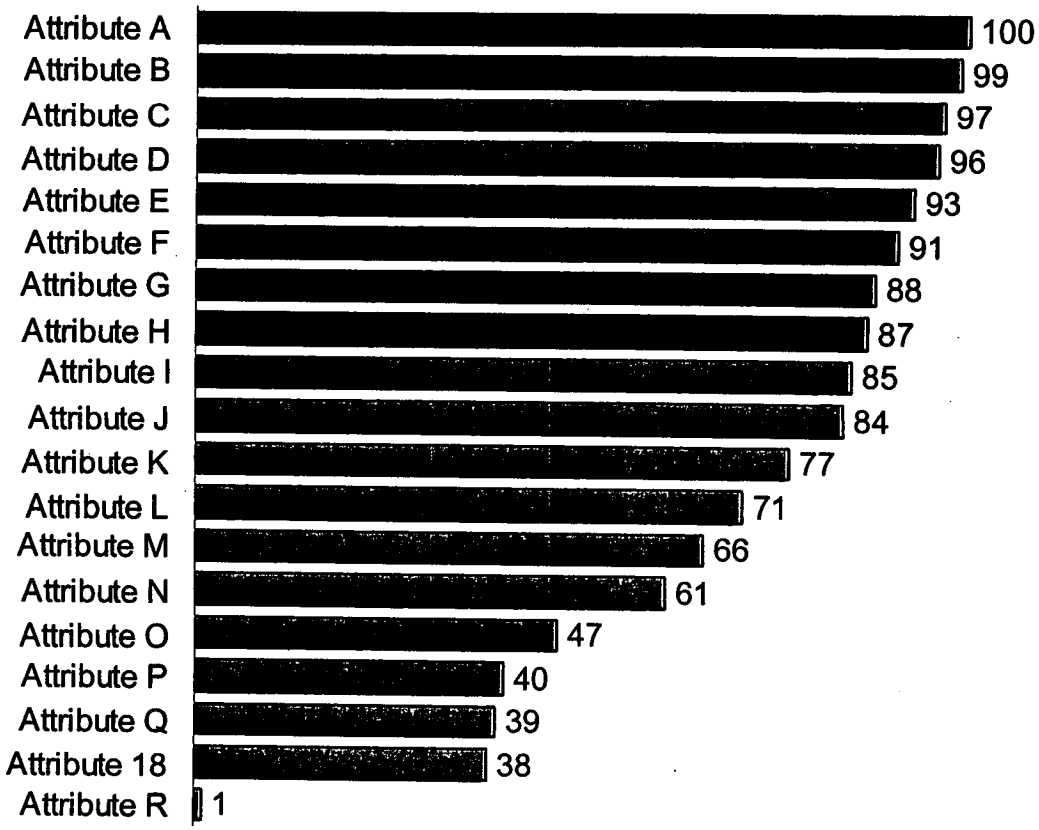
"What are the drivers of brand preference in our category?"

The findings from the derived importance analysis are presented graphically in an Importance Hierarchy.

- The importance hierarchy identifies the perceptions that consumers most strongly associate with their preferred brands.



Sample data; for illustrative purposes only

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"Is our brand strong on the benefits that matter most to consumers?"

In order to understand how consumers perceive the brand to perform on the attributes that are drivers of brand preference, an image profile is created showing the brand's overall performance and standardized profile.

- The standardized profile provides an understanding of the brand's strengths and weaknesses relative to the other brands in its competitive set.
- Standardization tells you how much higher or lower a brand's rating on a particular attribute is compared to the value you would expect based on:
  - How highly the brand is rated overall, i.e., the brand's mean rating.
  - How often the attribute is associated across all the brands, i.e., the attribute's mean rating.

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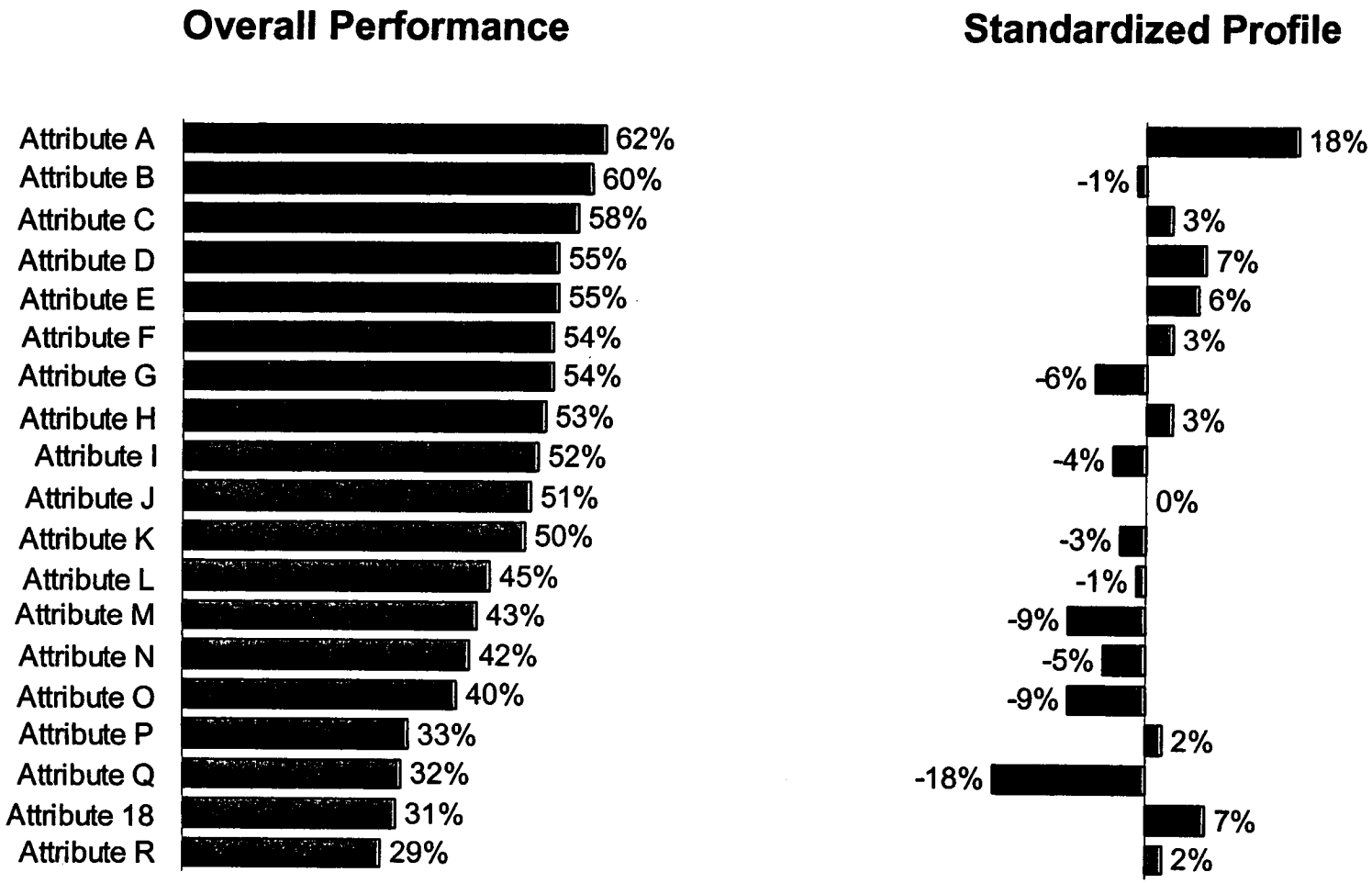
Brand Image Profile: Client Brand



Sample data; for illustration purposes only

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"What do we need to do now to strengthen our brand's competitive position in the marketplace?"

The final analytic step combines the outputs from the key driver analysis and the brand's standardized image profile to produce the Strategic Matrix.

- The Strategic Matrix clearly demonstrates how the brand is performing on each attribute and the relative importance of these attributes to brand selection.

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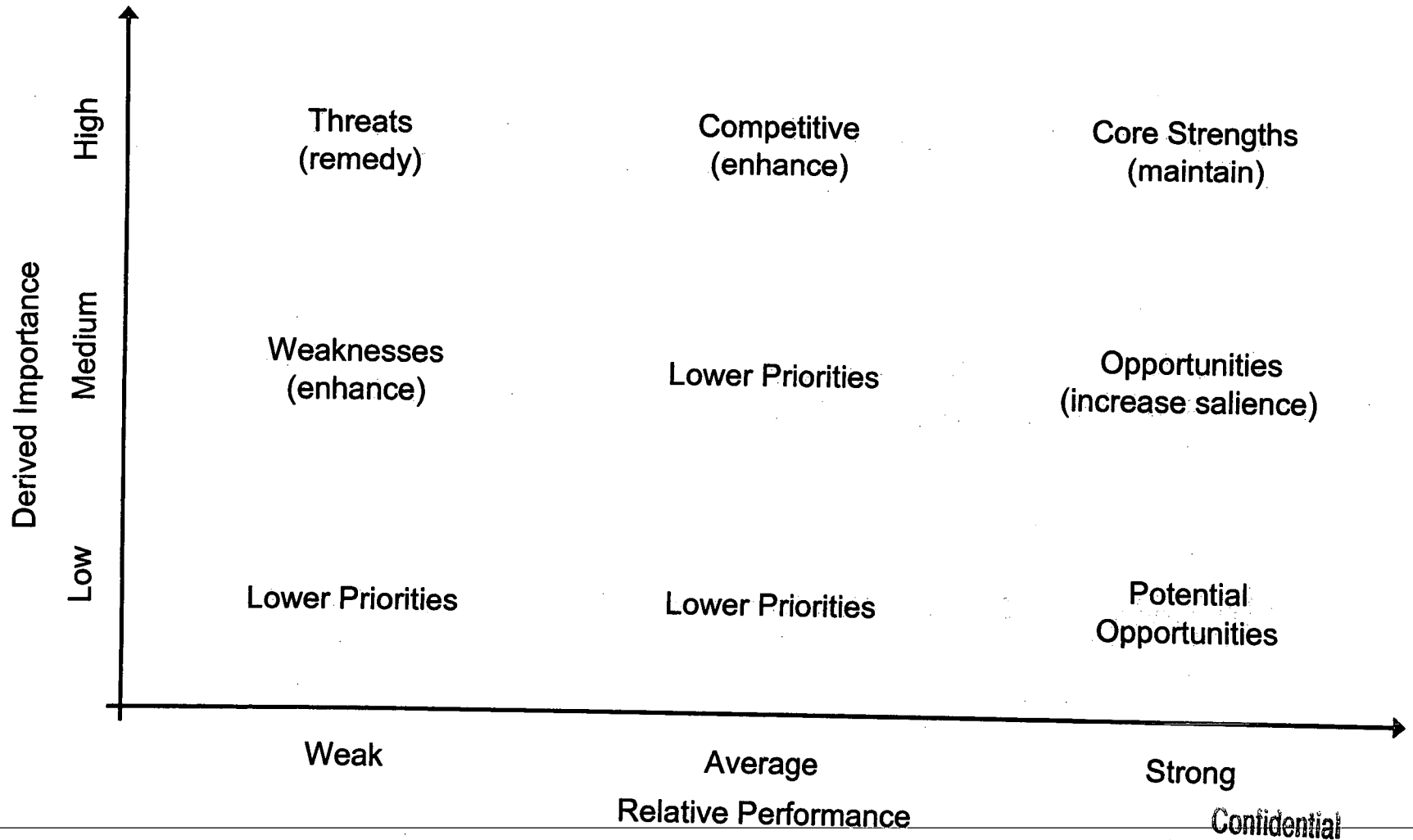
PinPoint™ Strategic Matrix

The Strategic Matrix provides specific and actionable direction in terms of how to optimize the brand's positioning:



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Total Muellers Category Drivers

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Total Muellers: Category Drivers

Similar to all other areas, within the Total Muellers sales territory, it is most critical to provide consumers with a strong product relative to Consistent Taste & Texture.

- Tasting best and having a good texture are most critical.

- Next in line in terms of importance is one of the Inspiration & Versatility attributes: being a brand that consumers can rely on for everyday occasions.

- Several Consistent Taste & Texture elements are next most important:
  - Being a brand consumers can rely on to provide a nutritious meal
  - Cooks perfectly every time
  - High quality
  - Favorite brand regardless of price
  - Being a brand consumers can rely on for special occasions.

- Being a good value is important, though being a low priced brand is not. Neither is being a low/reduced carb brand.
  - Attributes related to Heritage & Authenticity are also of little importance.

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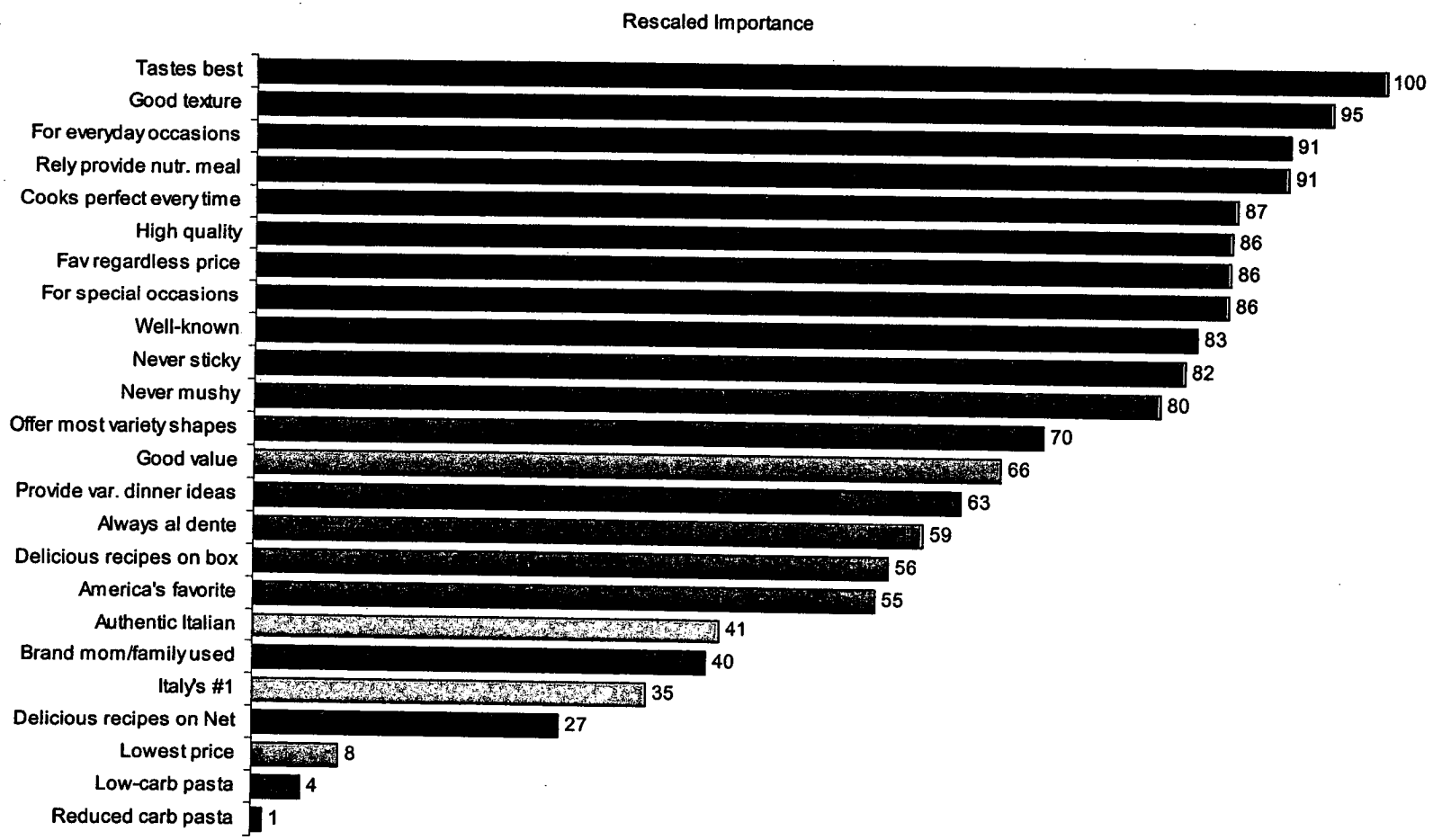
Total Muellers: Importance Hierarchy



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Total Muellers Market Structure

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Total Muellers: Market Structure

There are many brands offered in the Total Muellers market area. None is strongly aligned with the most critical elements – those related to providing a Consistent Taste and Texture.

- San Giorgio comes closest to being aligned with such attributes, though even this brand does not perform particularly well in this area.

Skinner, Prince, Creamette, Ronco, and Light 'N Fluffy are all perceived similarly.

Barilla has quite a unique brand image, as evidenced by its distance from the center of the map.

Store Brands align closely and are associated with attributes related to Price/Value.

- Giant, Publix, Great Value, and Kroger are perceived similarly and are seen as a good Price/Value.
- Harris Teeter, America's Choice, Albertsons, Food Lion, Private Selection, and Prestigio are perceived as similar.

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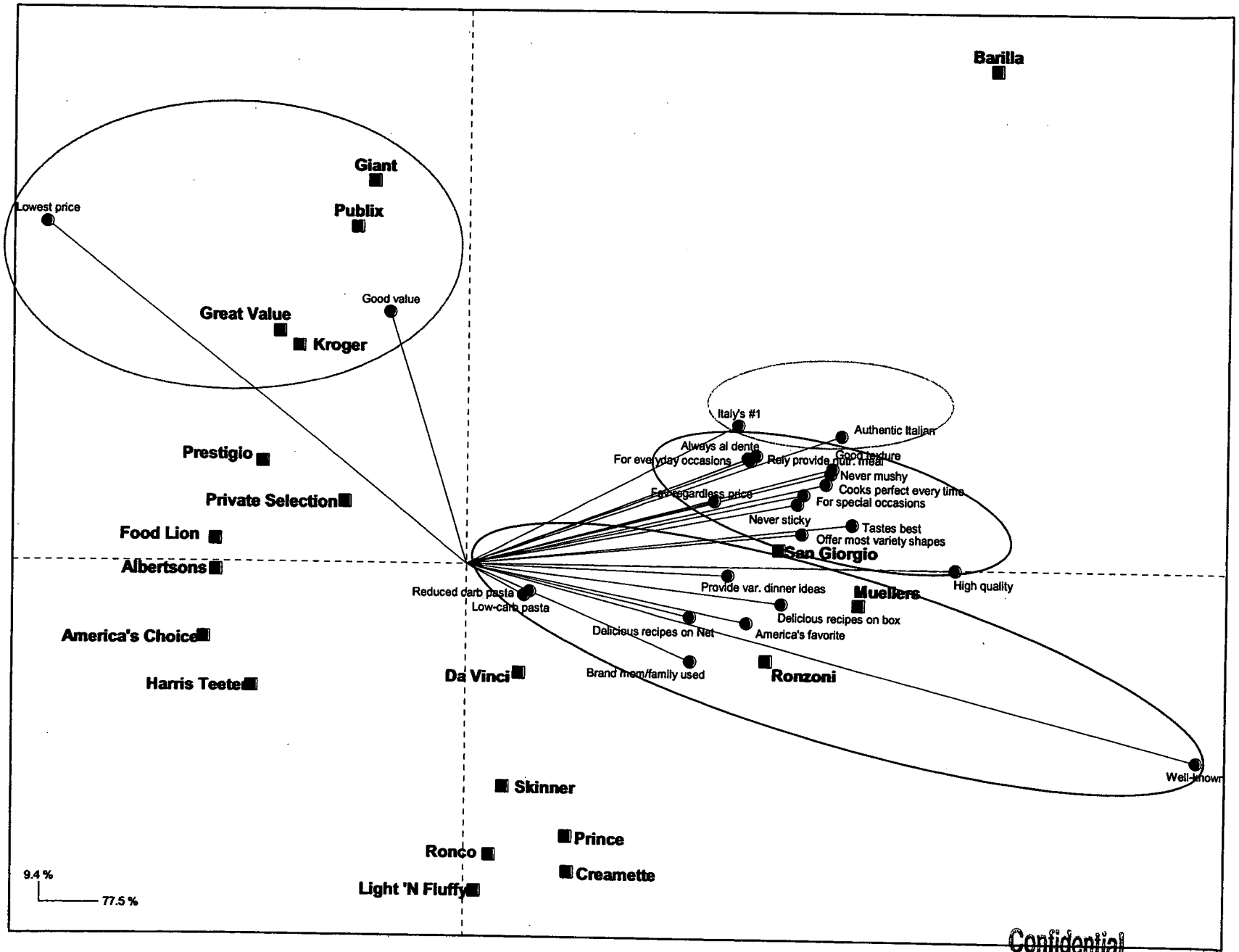
Total Muellers: Market Structure



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Total Muellers
Brand Image Analysis

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Total Muellers: Brand Image Analysis

Mueller and Ronzoni have virtually identical brand images.

- Both are perceived as well-known brands, America's favorite brand, a brand mom/family used and ones that are offered in a variety of shapes.
- Both are under-performers for having a good texture, being a brand to rely on for everyday occasions, and for providing a good value.
- To a lesser degree, San Giorgio has a similar brand image, as this brand is considered well-known and is not rated highly for everyday use or good value.
    - However, San Giorgio is unique in that it is viewed as more authentically Italian.

Ronco does not have a well-defined brand image in the Muellers Total territory. Rather, it is rated average on virtually all attributes.

Barilla is rated highly on several very important elements: tastes best, high quality, and favorite brand regardless of price.

- It is also strong on the moderately important attributes of being Italy's #1 pasta, being authentic Italian, and is always Al Dente.
- Consumers perceptions deliver three critical areas in which the brand does not perform well: being a brand for everyday occasions, good texture, and good value.

All Store Brands generally offer low prices/good value but are not well-known.

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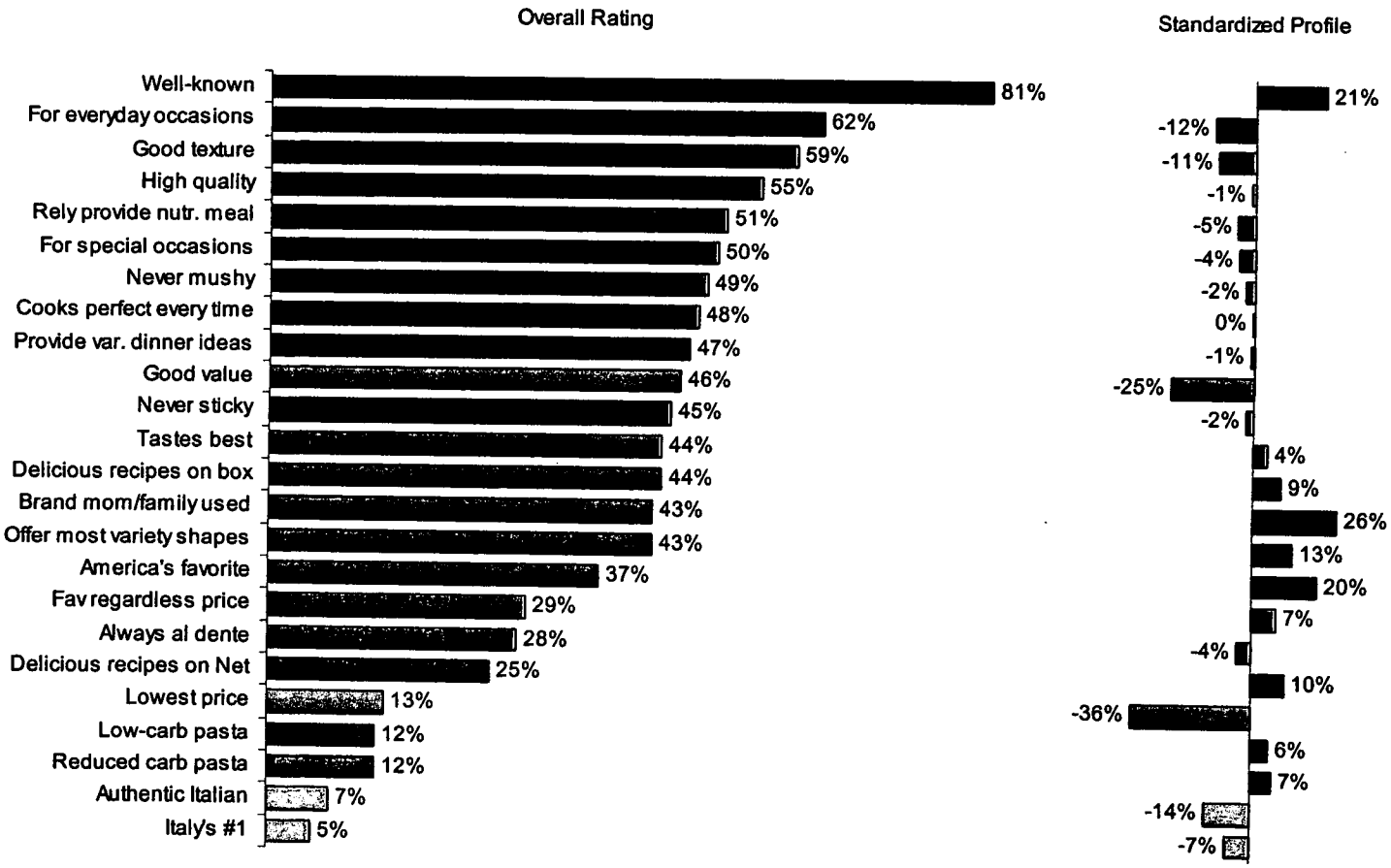
Total Muellers: Image Profile – Muellers



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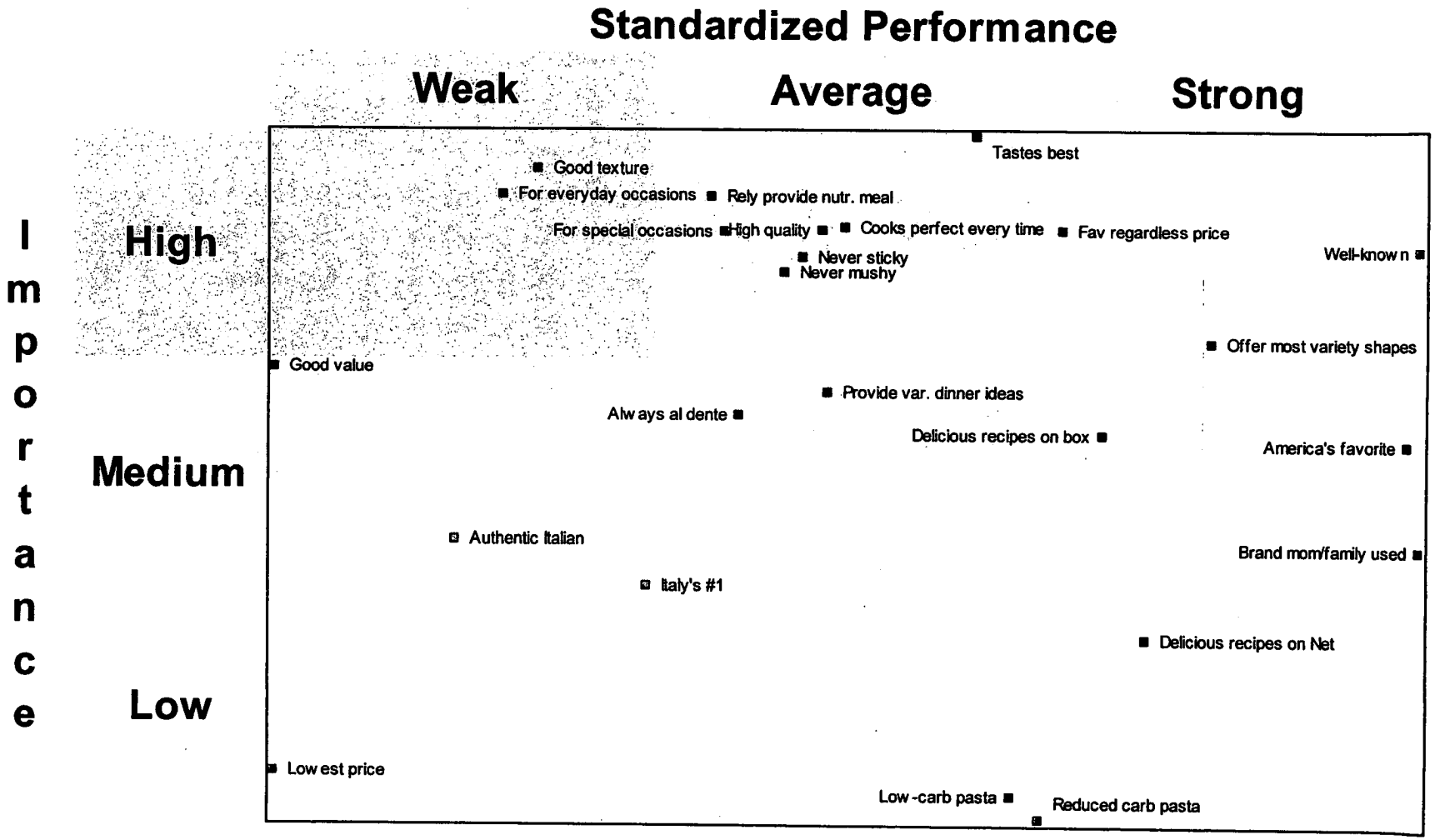
Total Muellers: Strategic Matrix – Muellers



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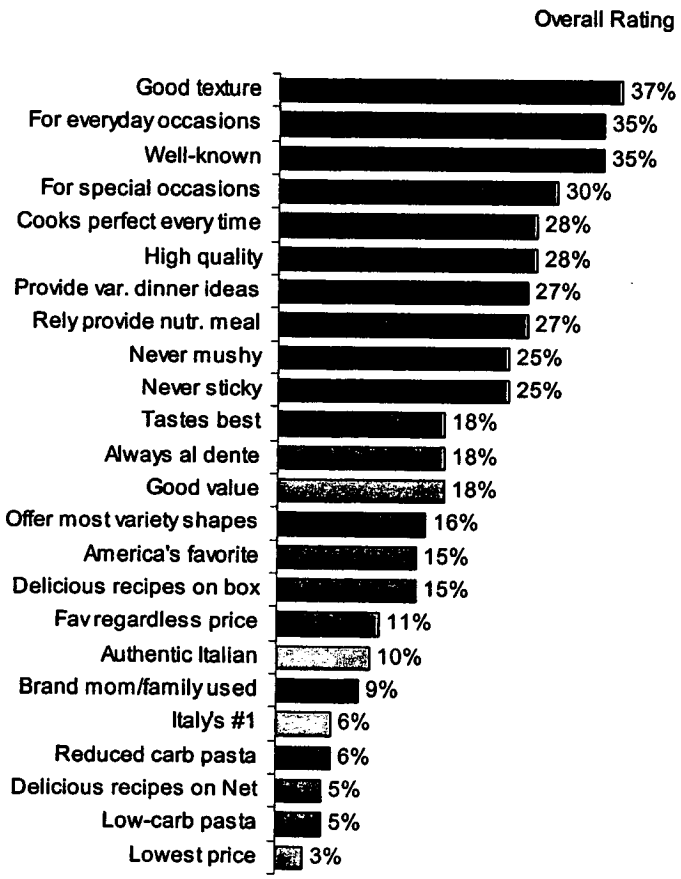
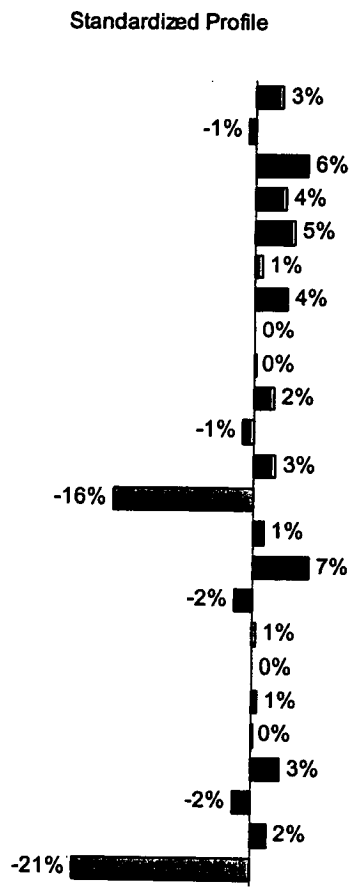
Total Muellers: Image Profile – Ronco





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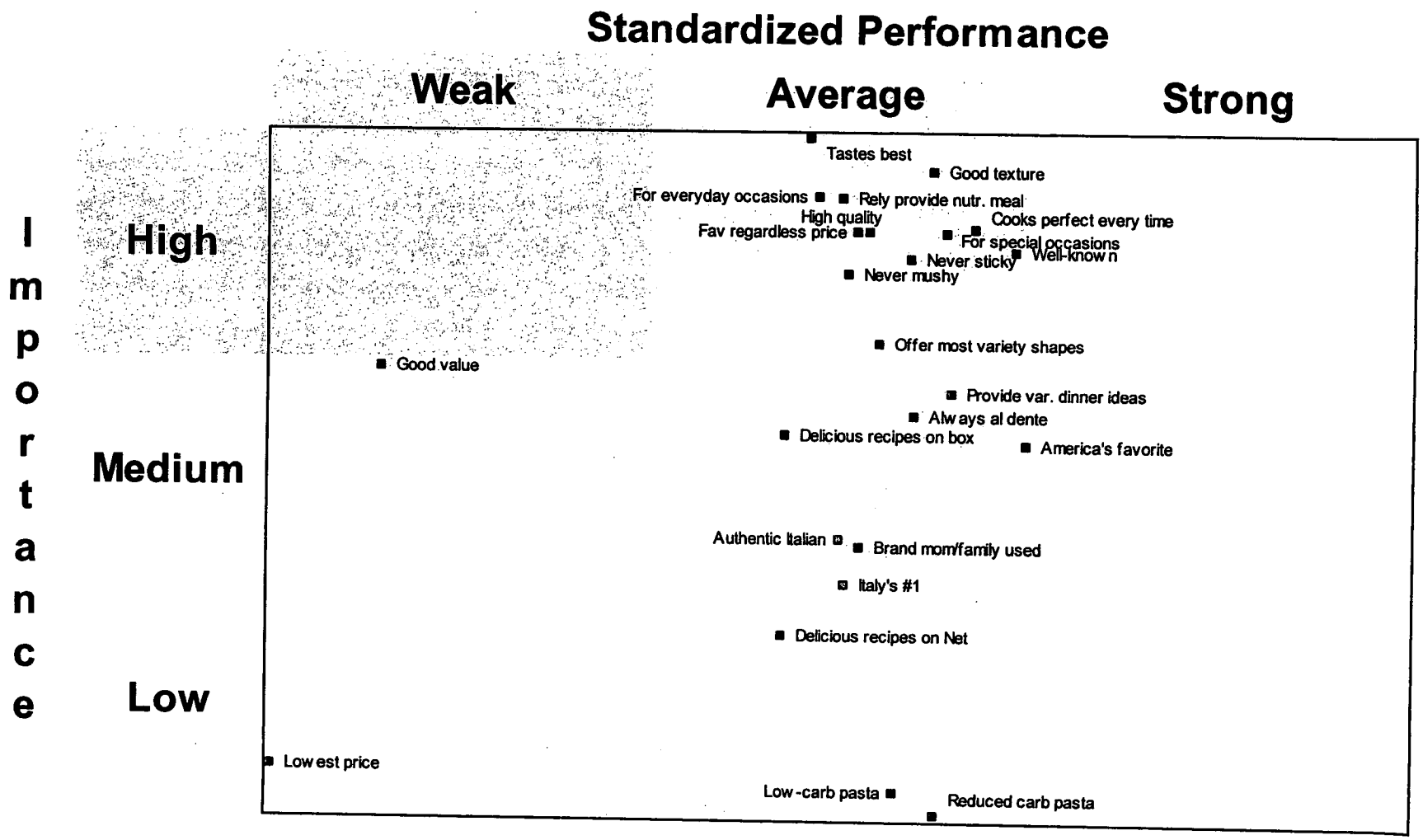
Total Muellers: Strategic Matrix – Ronco



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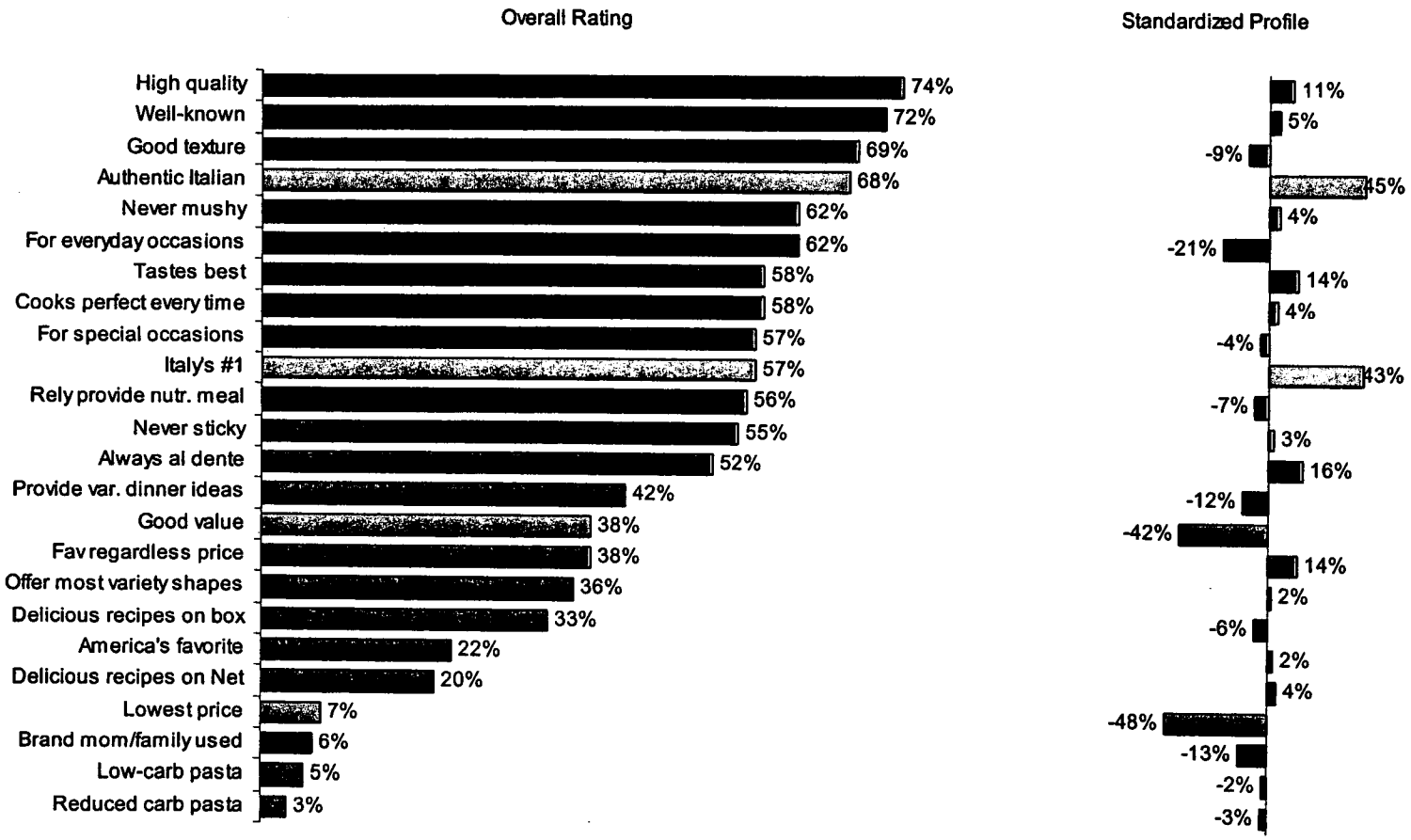
Total Muellers: Image Profile – Barilla



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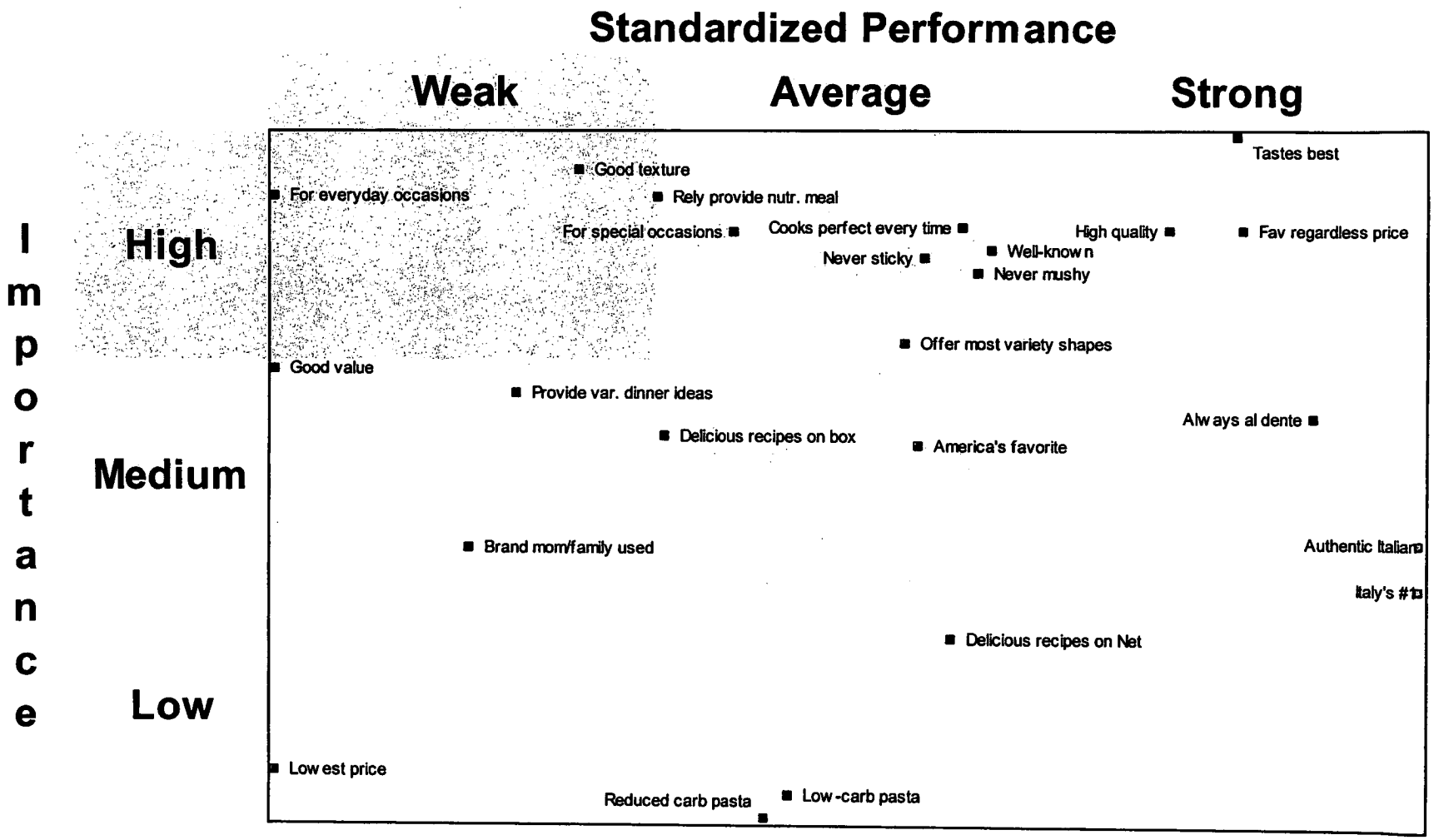
Total Muellers: Strategic Matrix – Barilla



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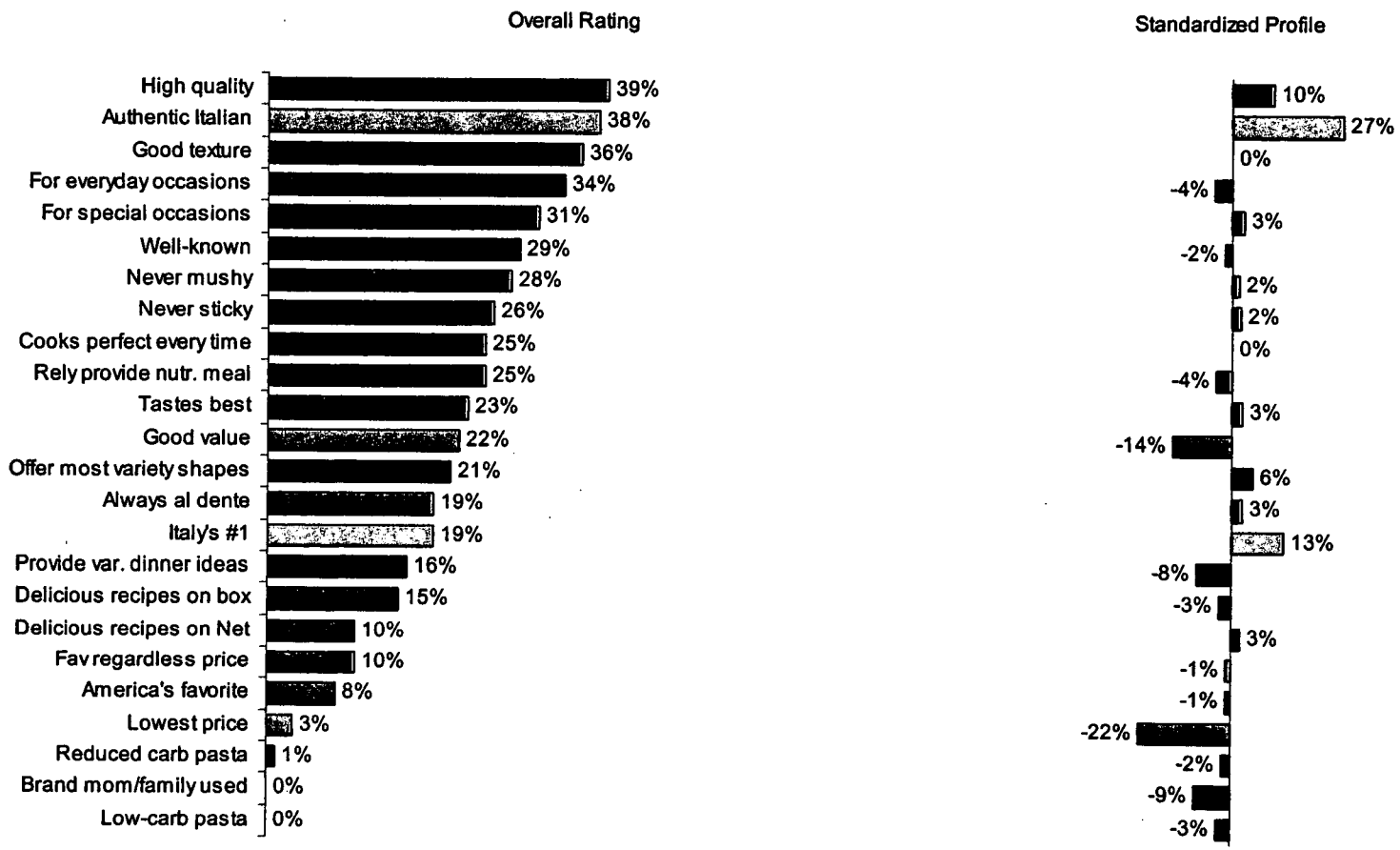
Total Muellers: Image Profile – Da Vinci



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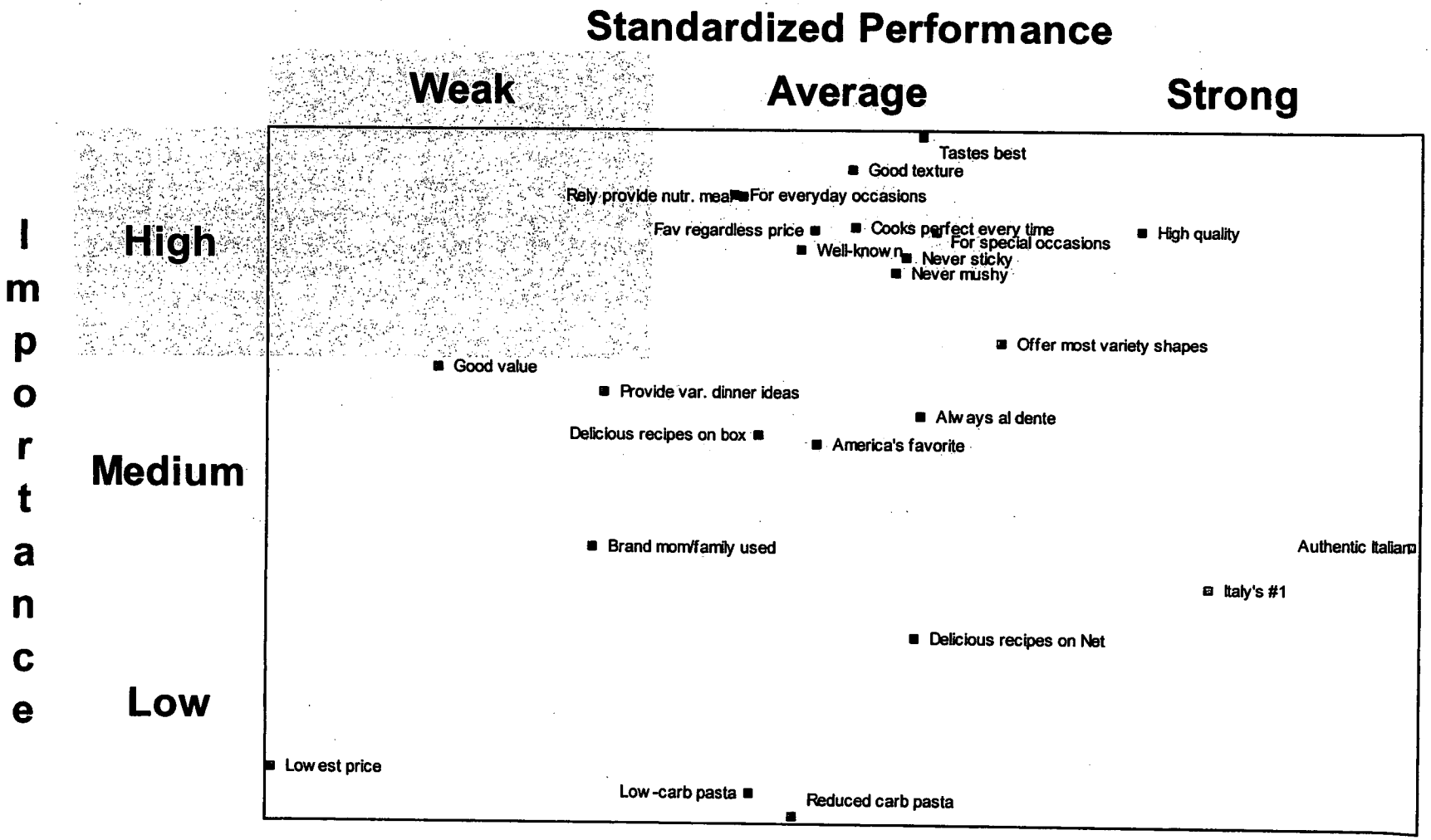
Total Muellers: Strategic Matrix – Da Vinci



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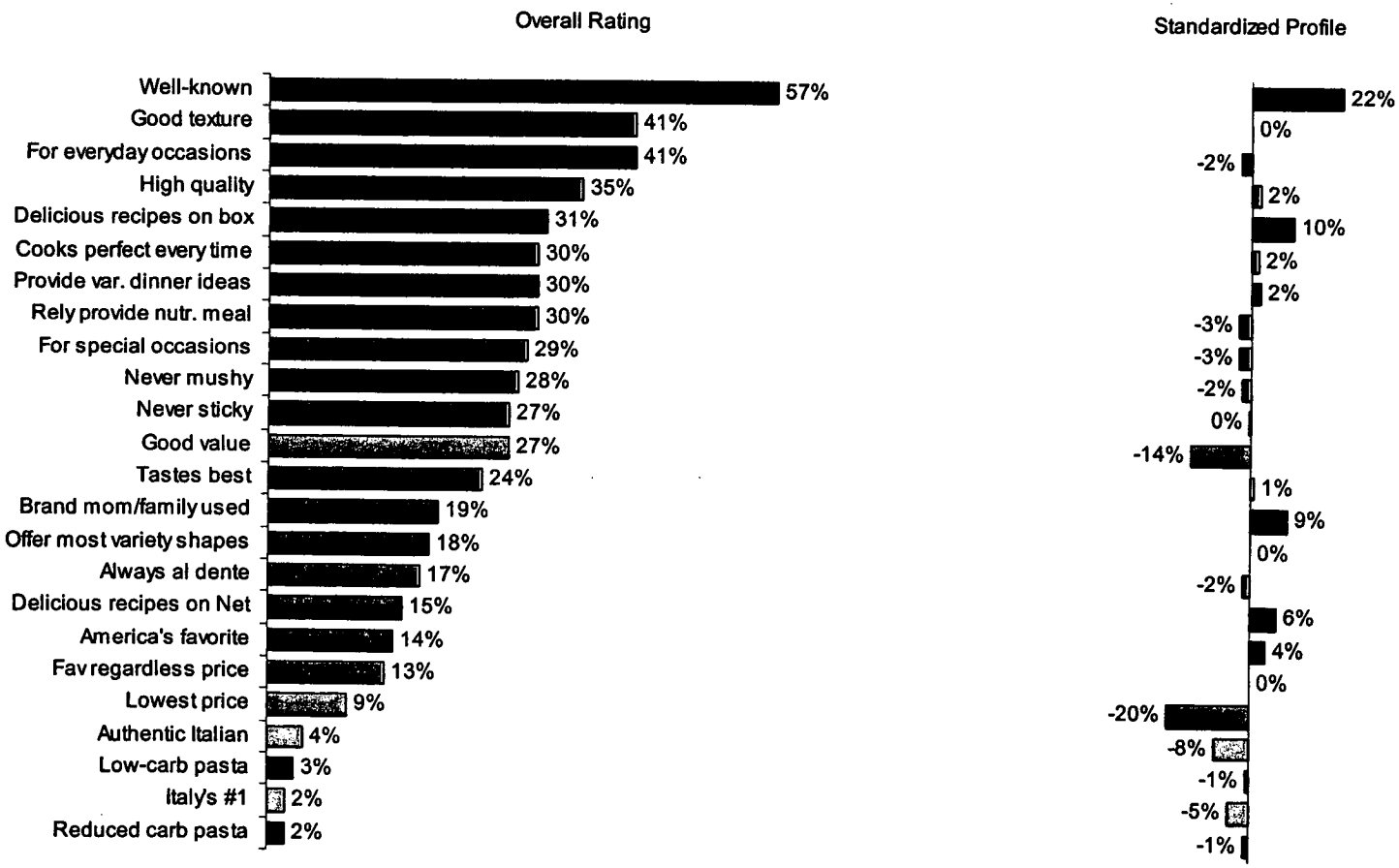
Total Muellers: Image Profile – Creamette



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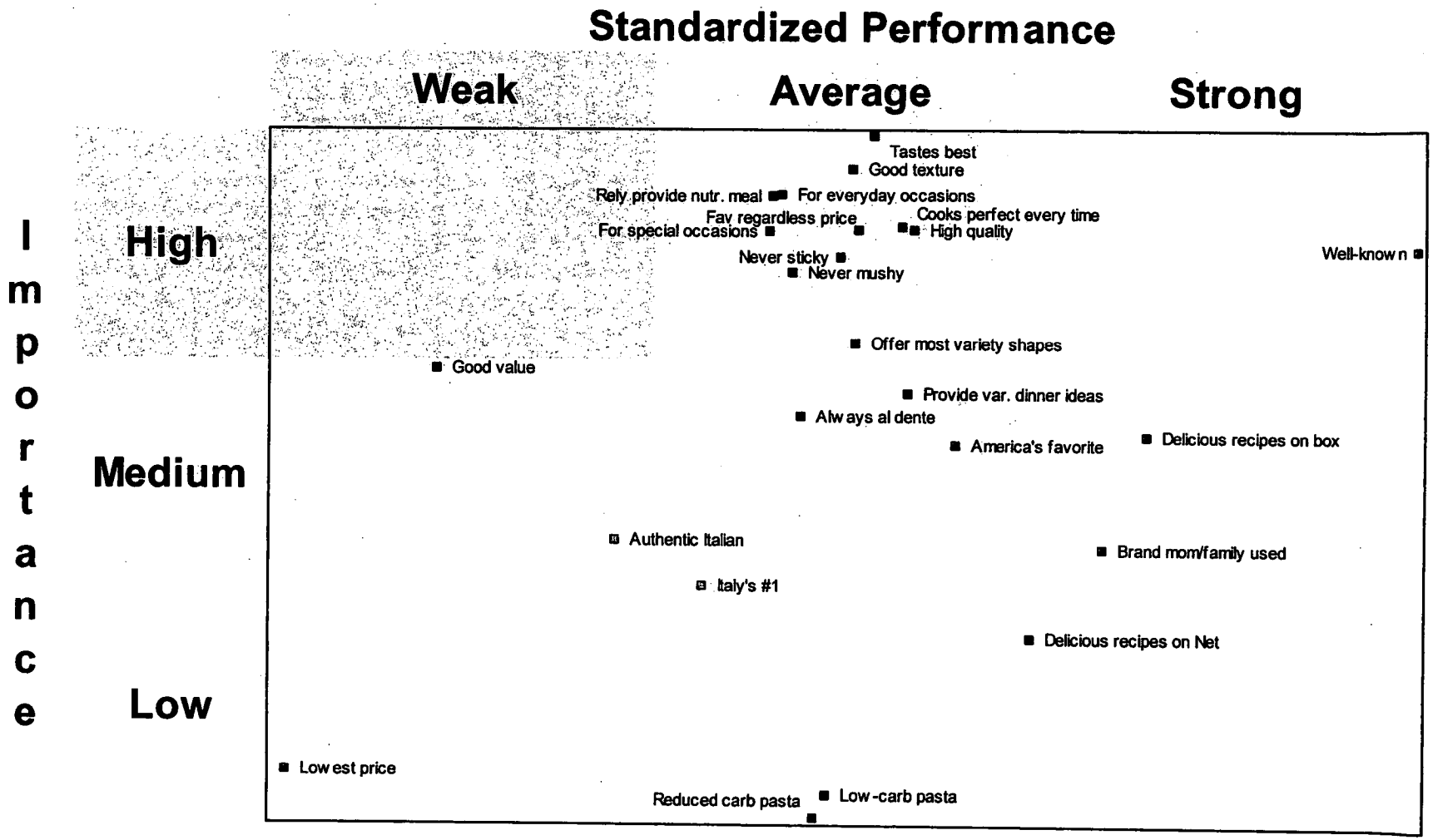
Total Muellers: Strategic Matrix – Creamette



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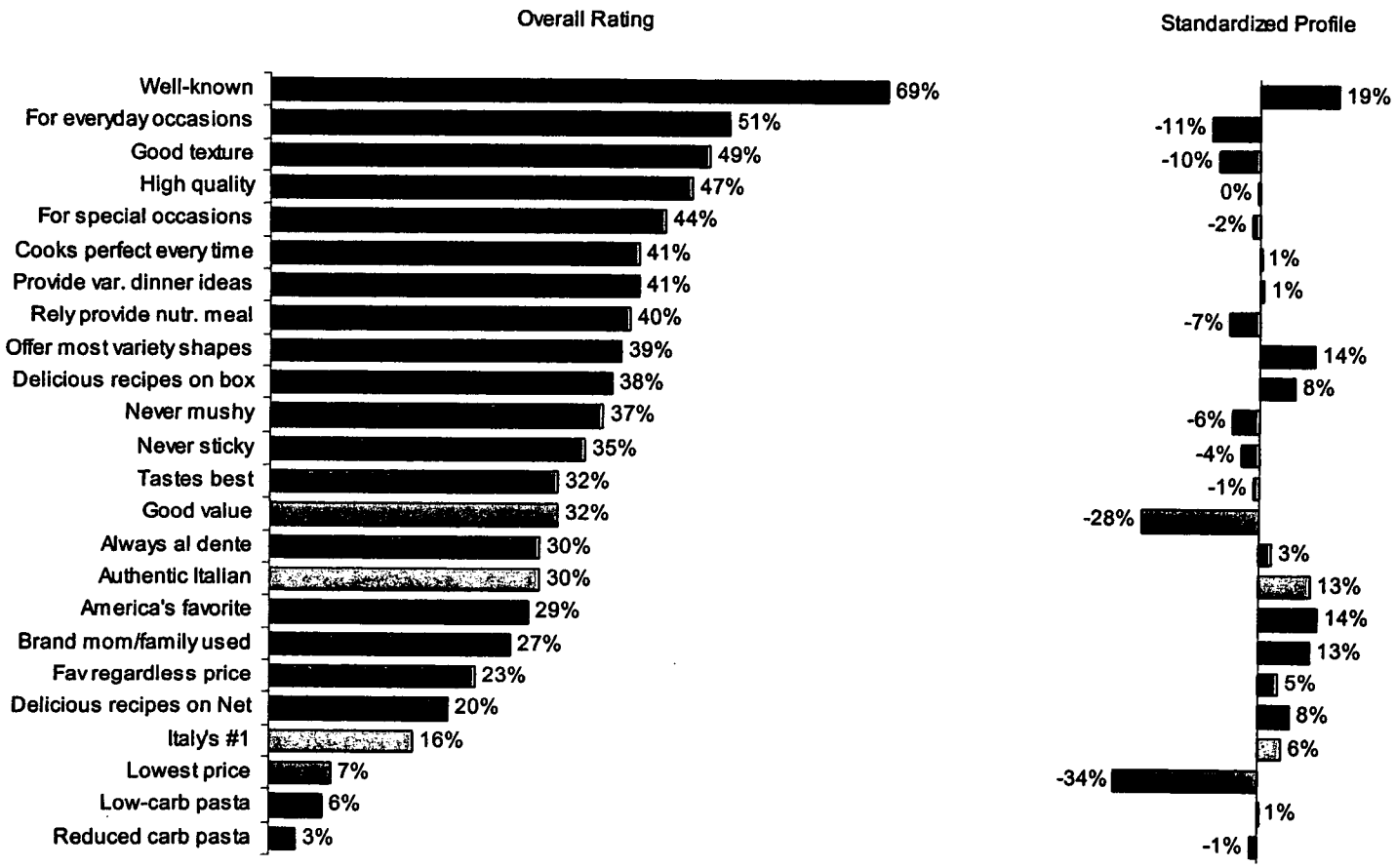
Total Muellers: Image Profile – Ronzoni



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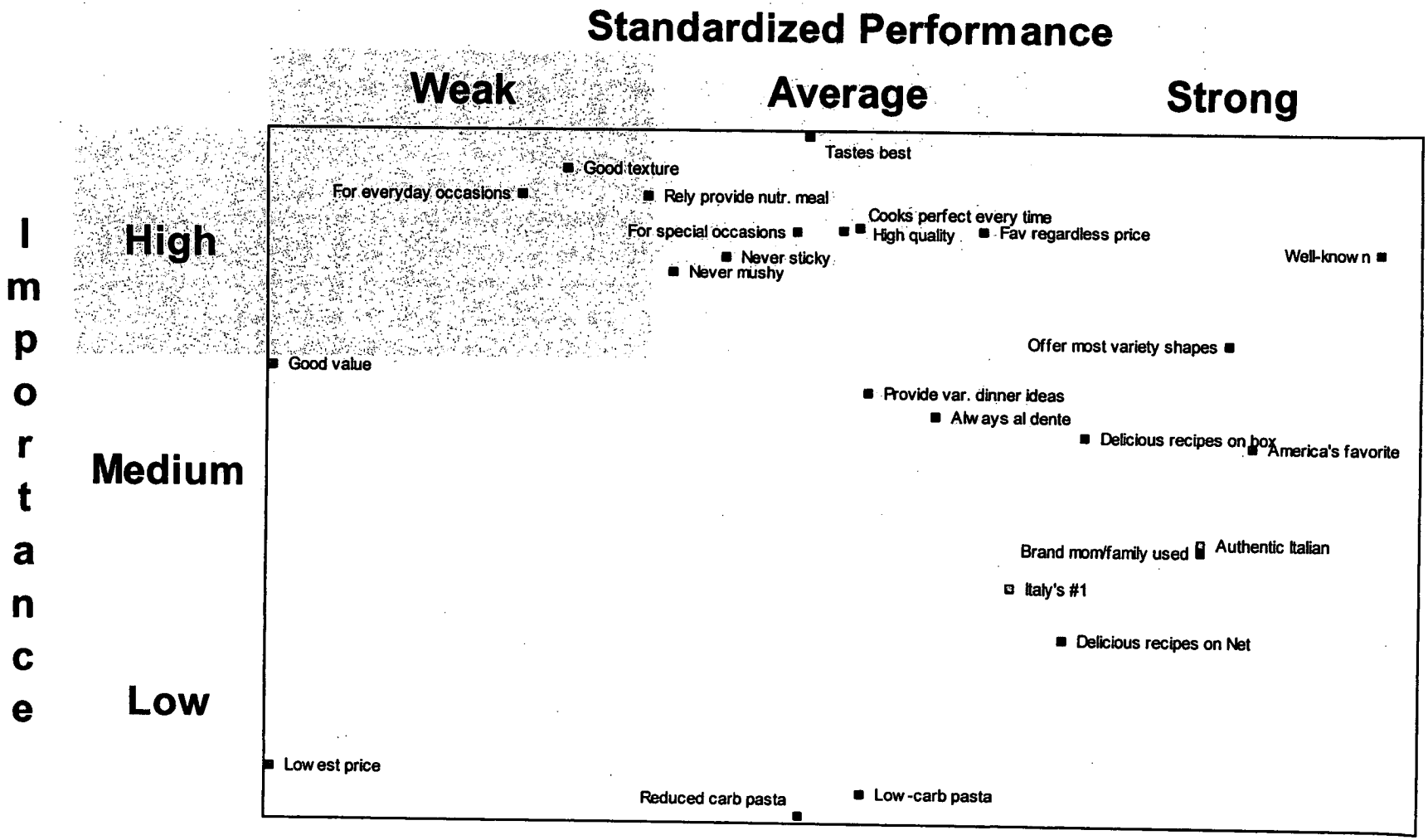
Total Muellers: Strategic Matrix – Ronzoni



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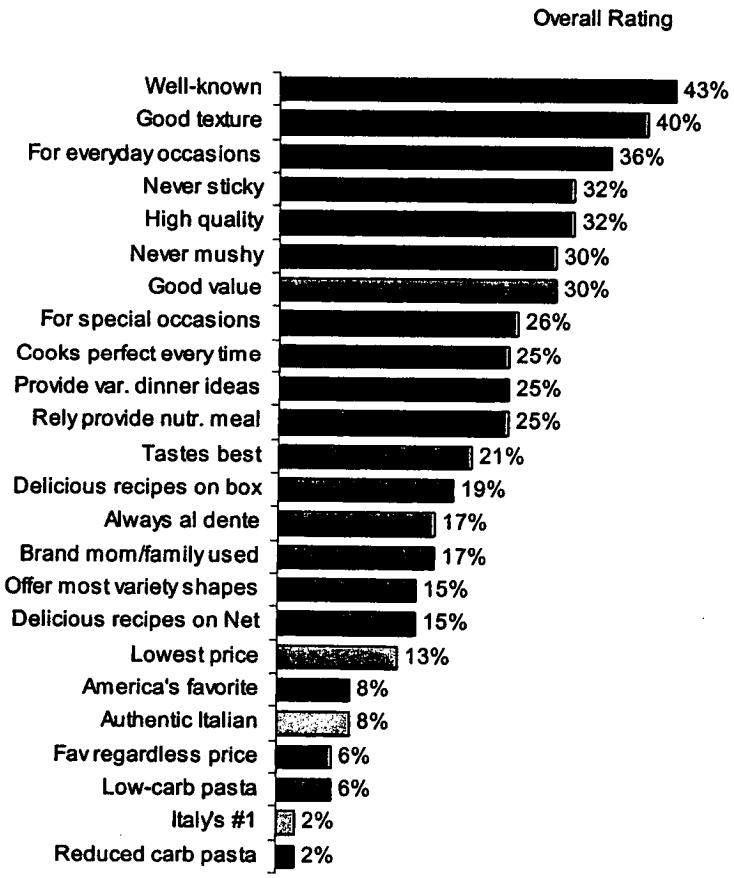
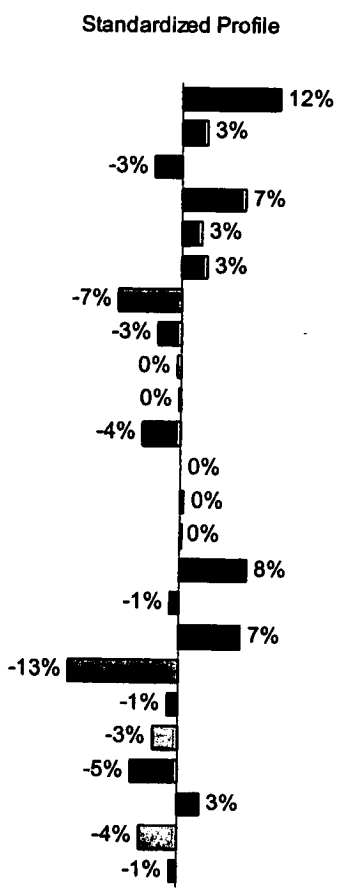
Total Muellers: Image Profile – Skinner





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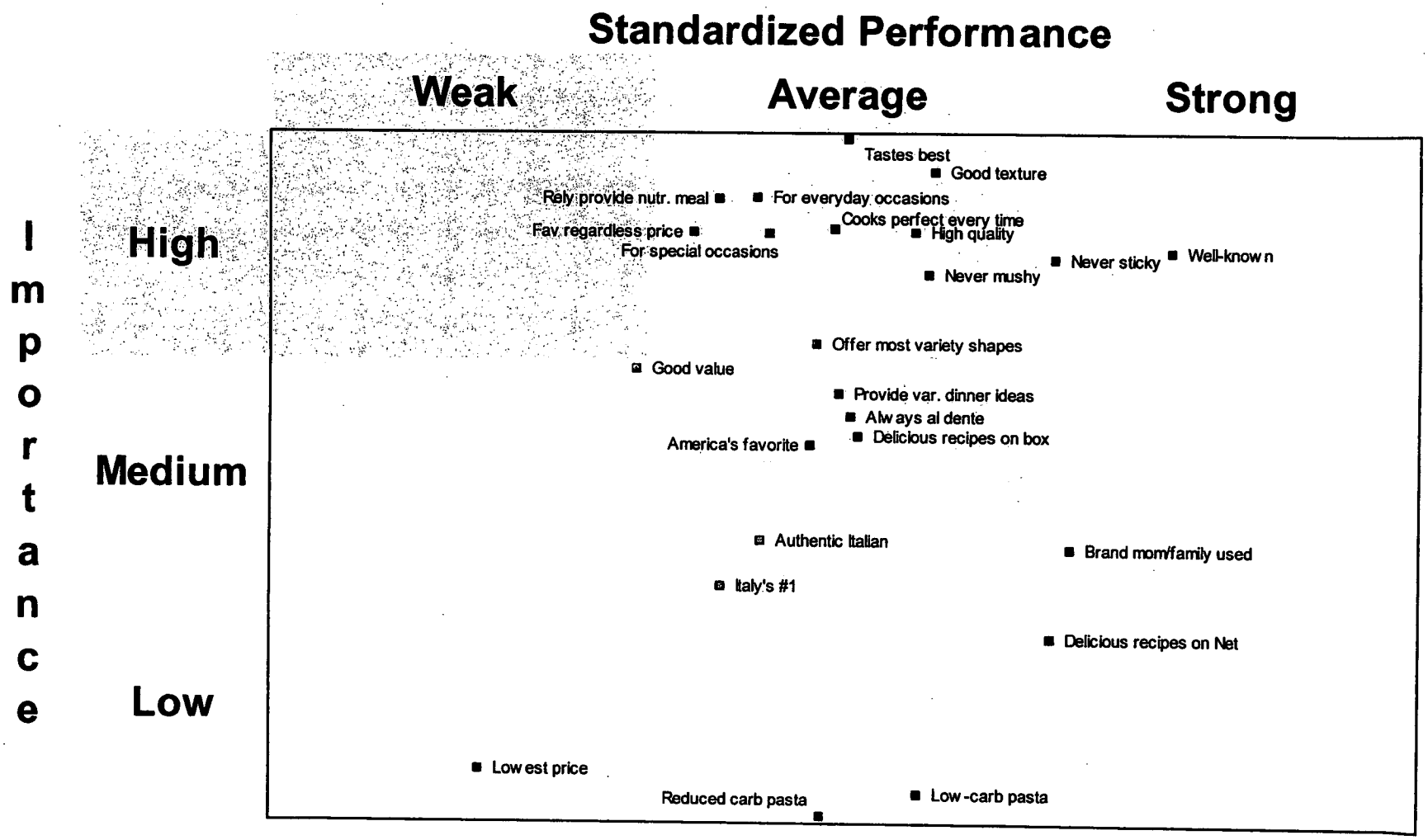
Total Muellers: Strategic Matrix – Skinner



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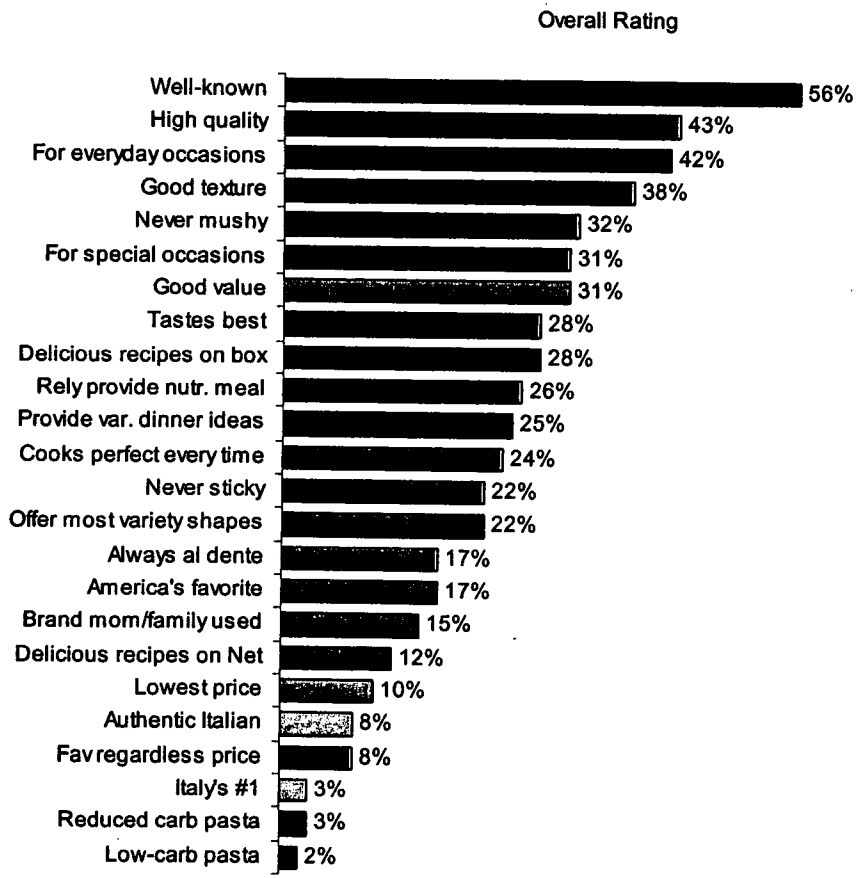
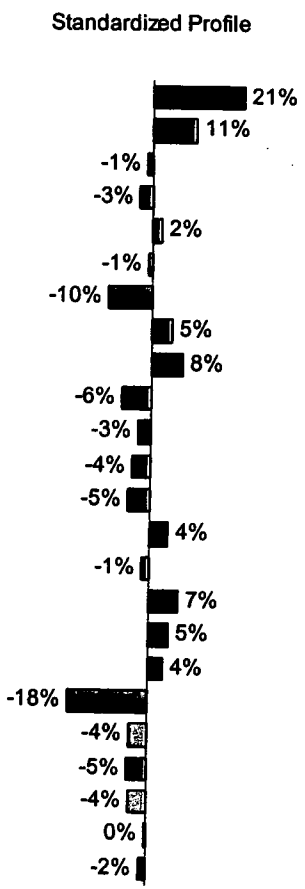
Total Muellers: Image Profile – Prince





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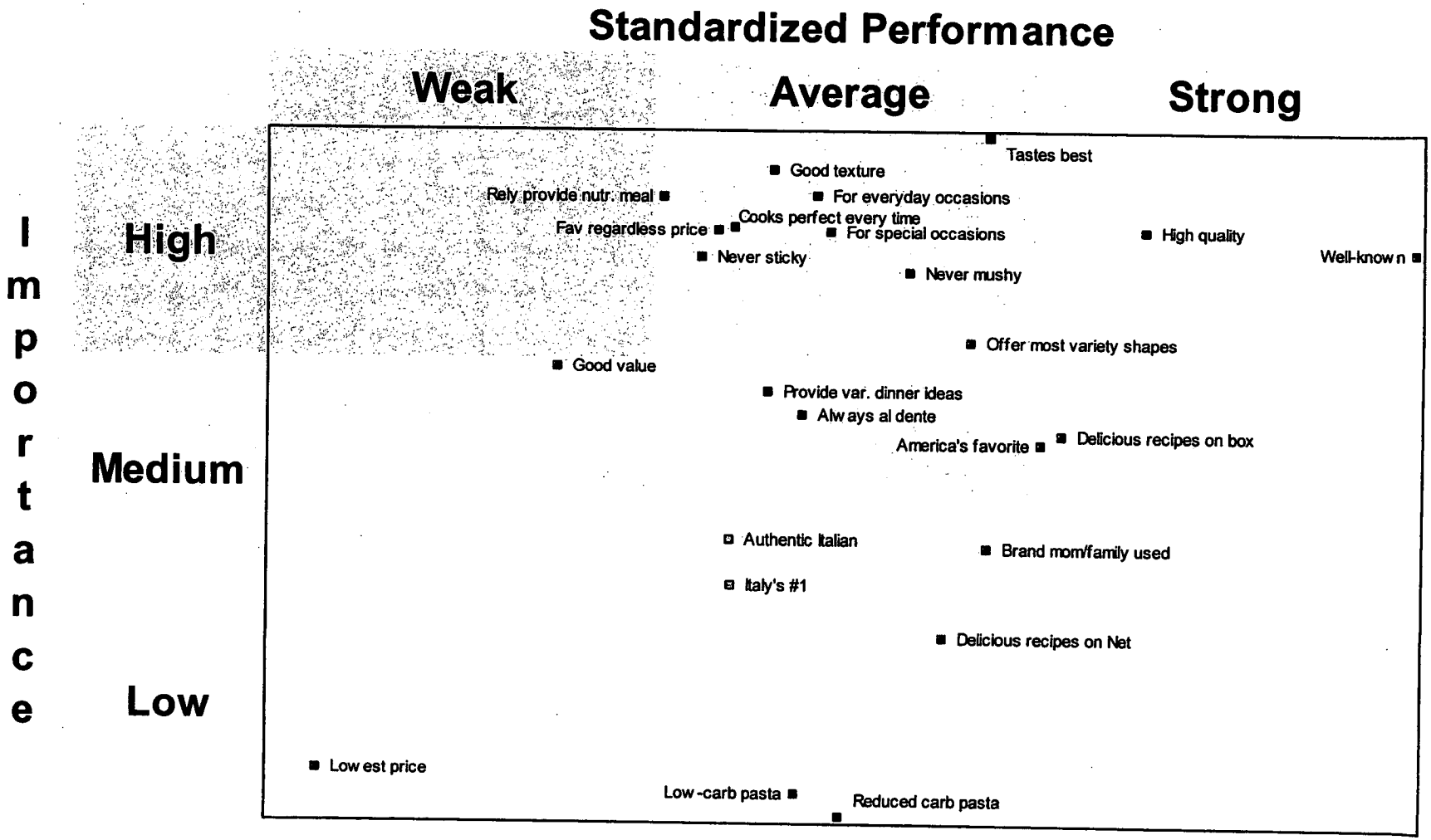
Total Muellers: Strategic Matrix – Prince



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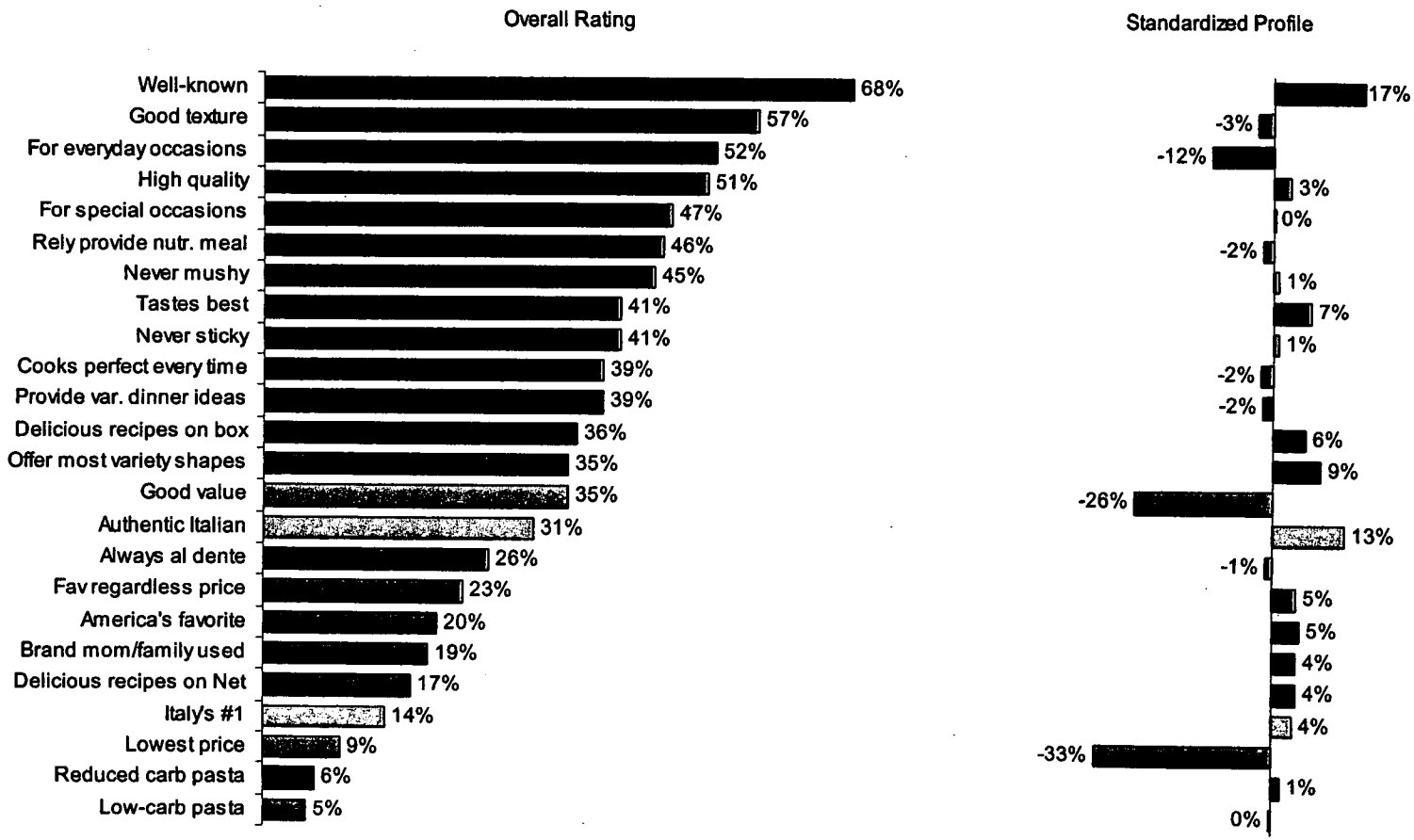
Total Muellers: Image Profile – San Giorgio



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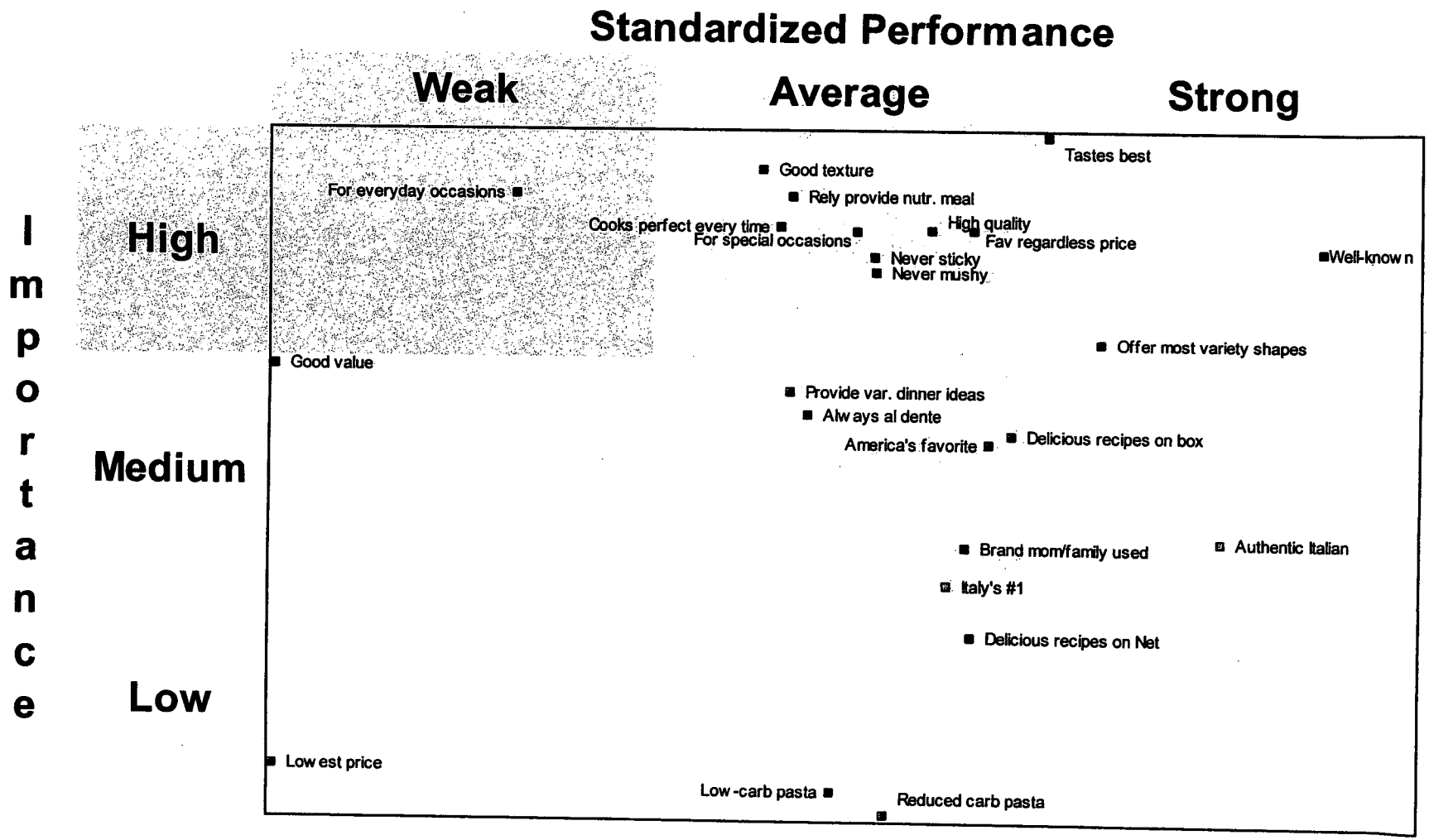
Total Muellers: Strategic Matrix – San Giorgio



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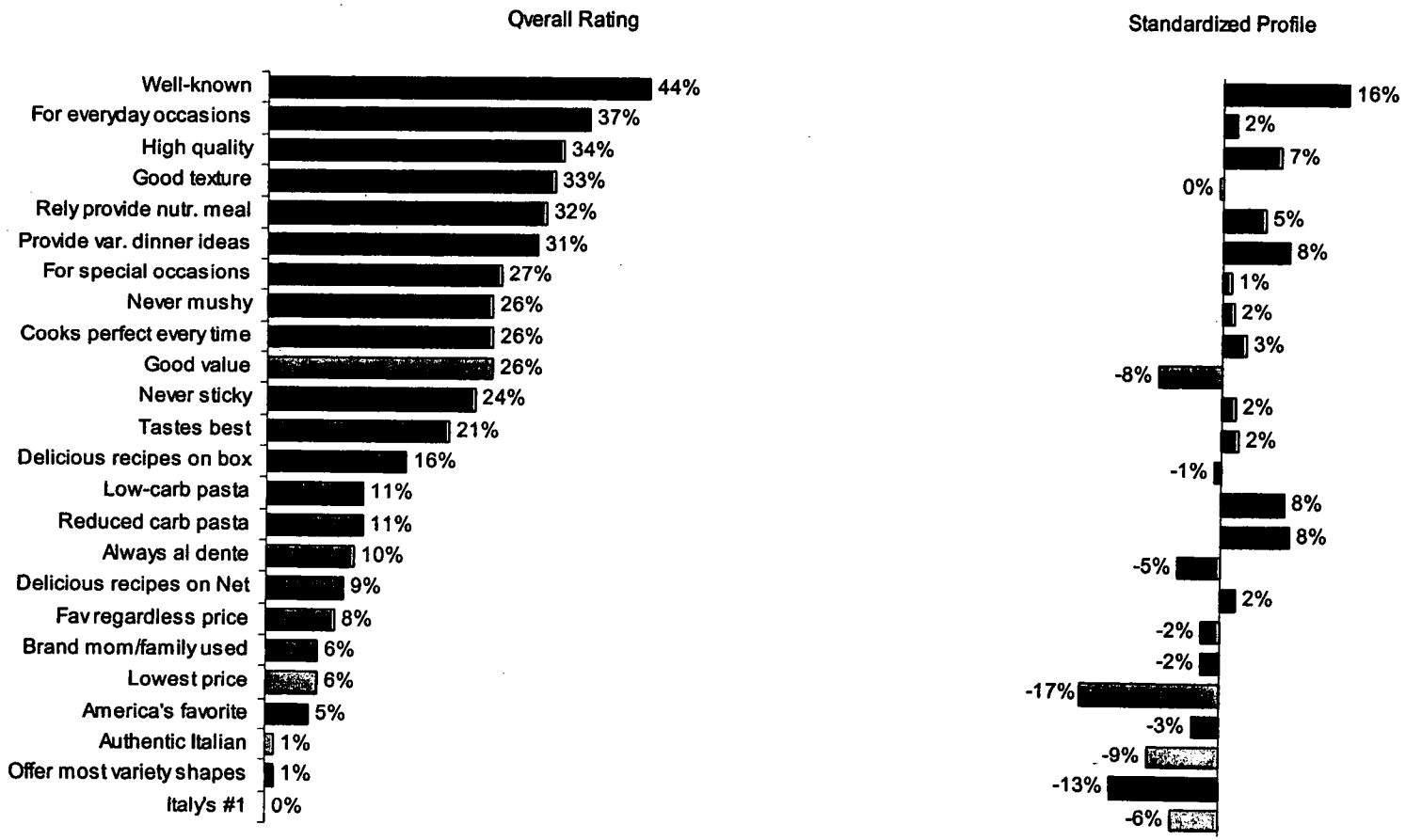
Total Muellers: Image Profile – Light 'N Fluffy



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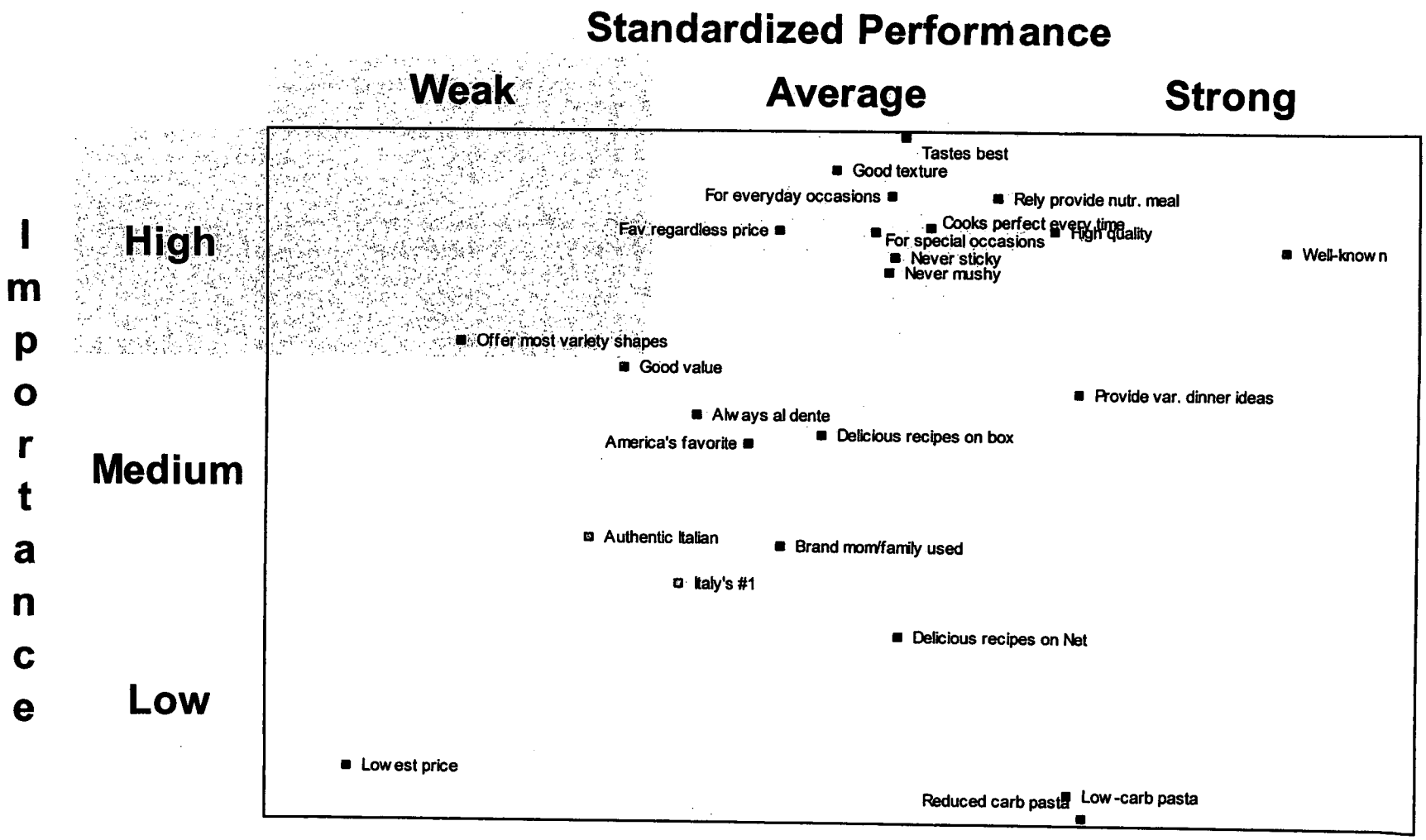
Total Muellers: Strategic Matrix – Light 'N Fluffy



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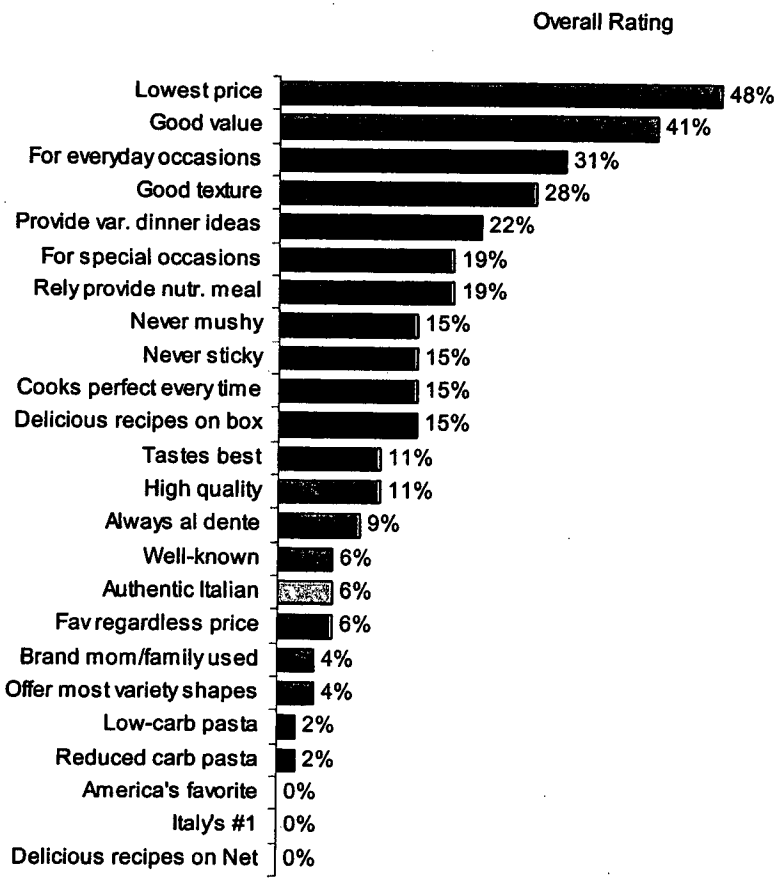
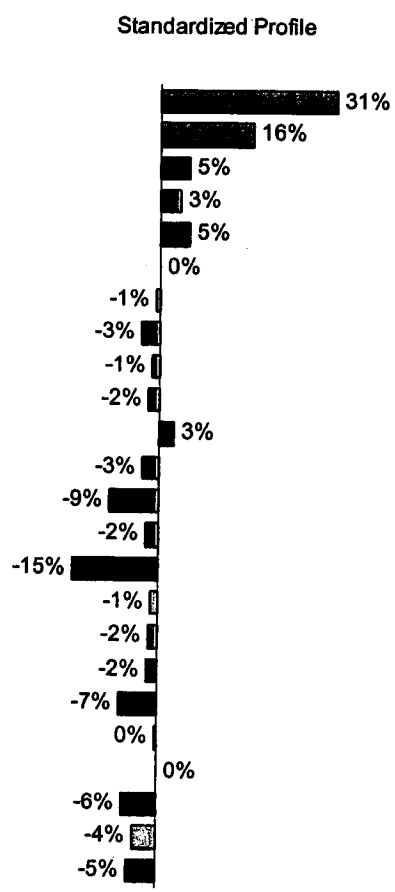
Total Muellers: Image Profile – Prestigio





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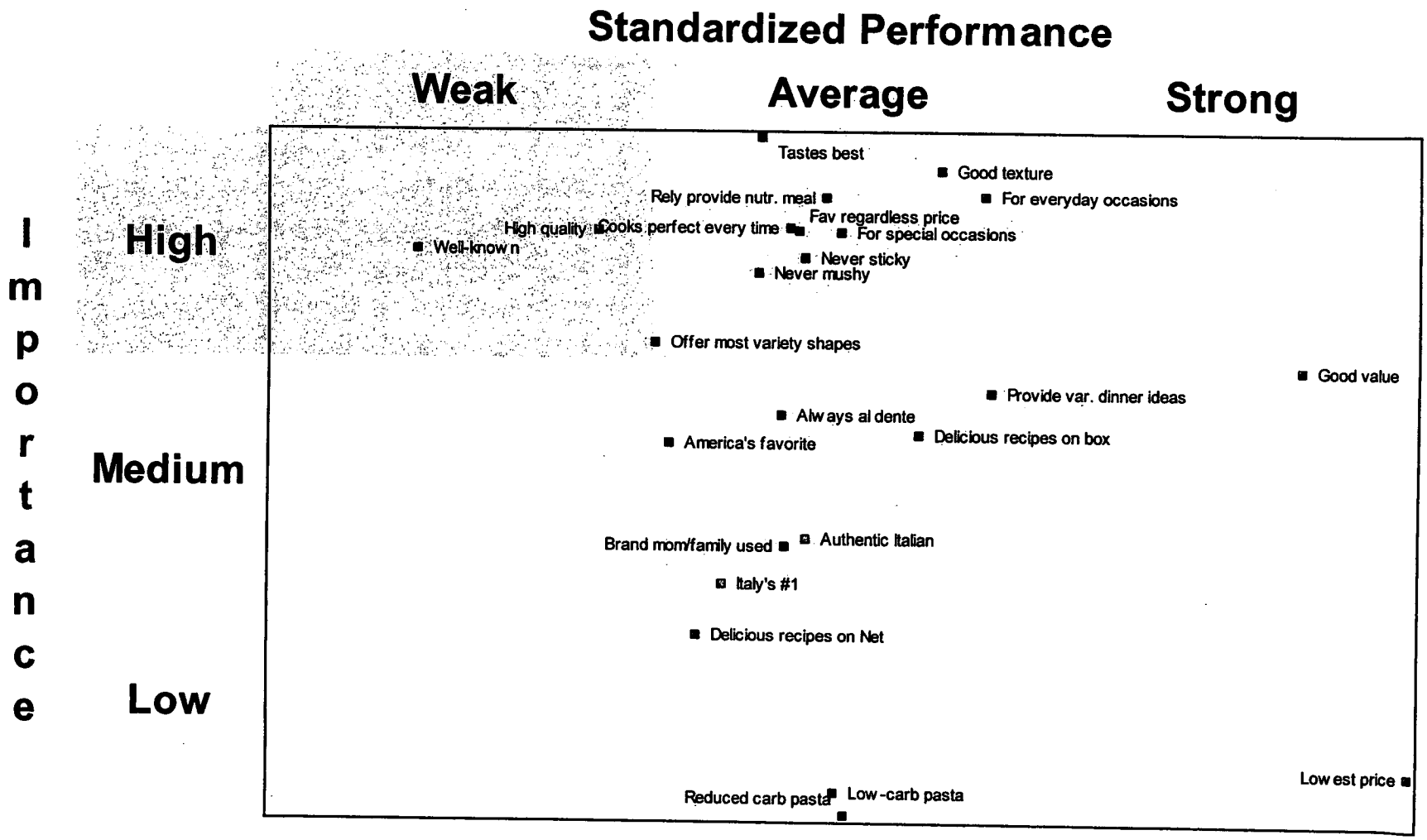
Total Muellers: Strategic Matrix – Prestigio



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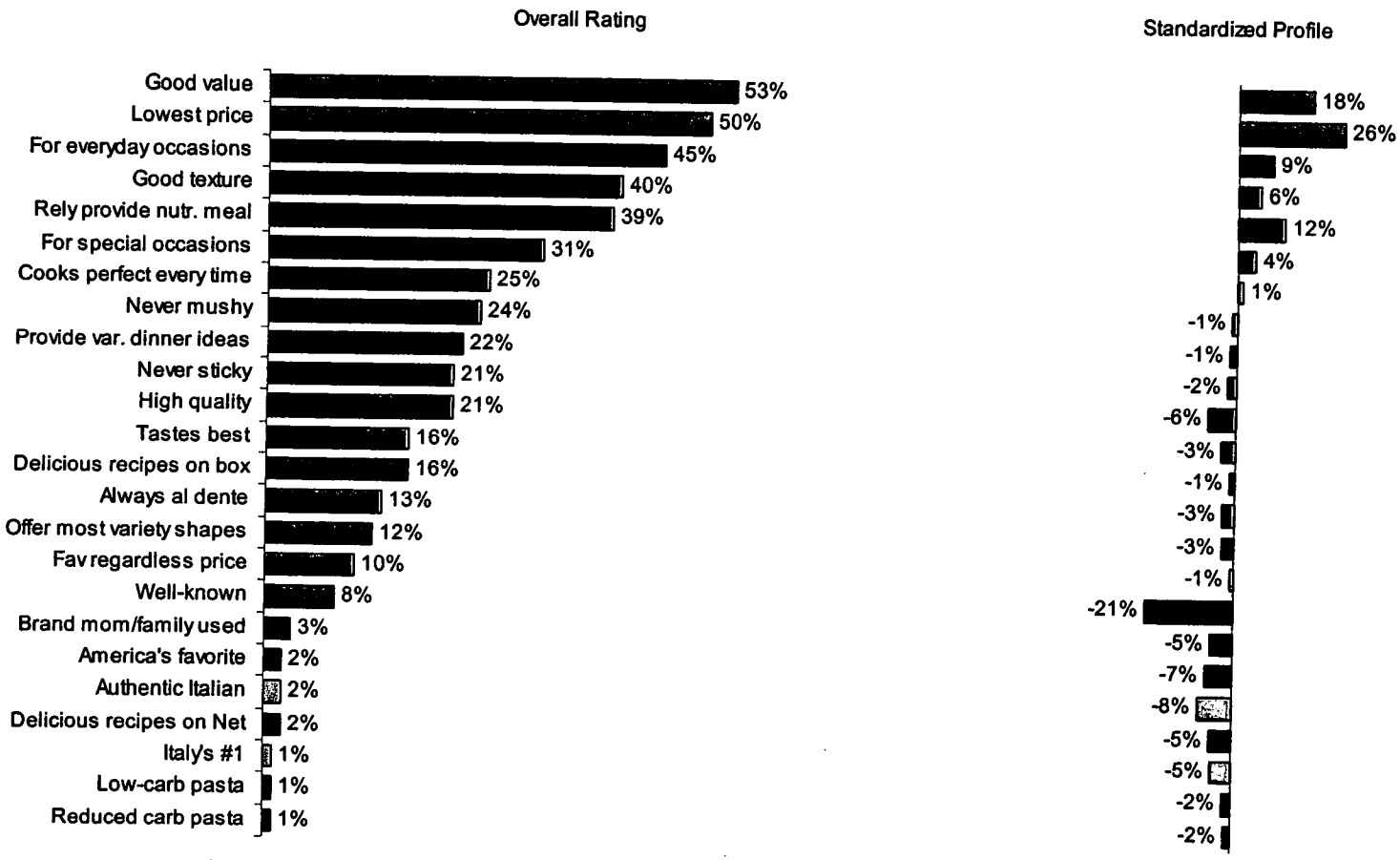
Total Muellers: Image Profile – Publix



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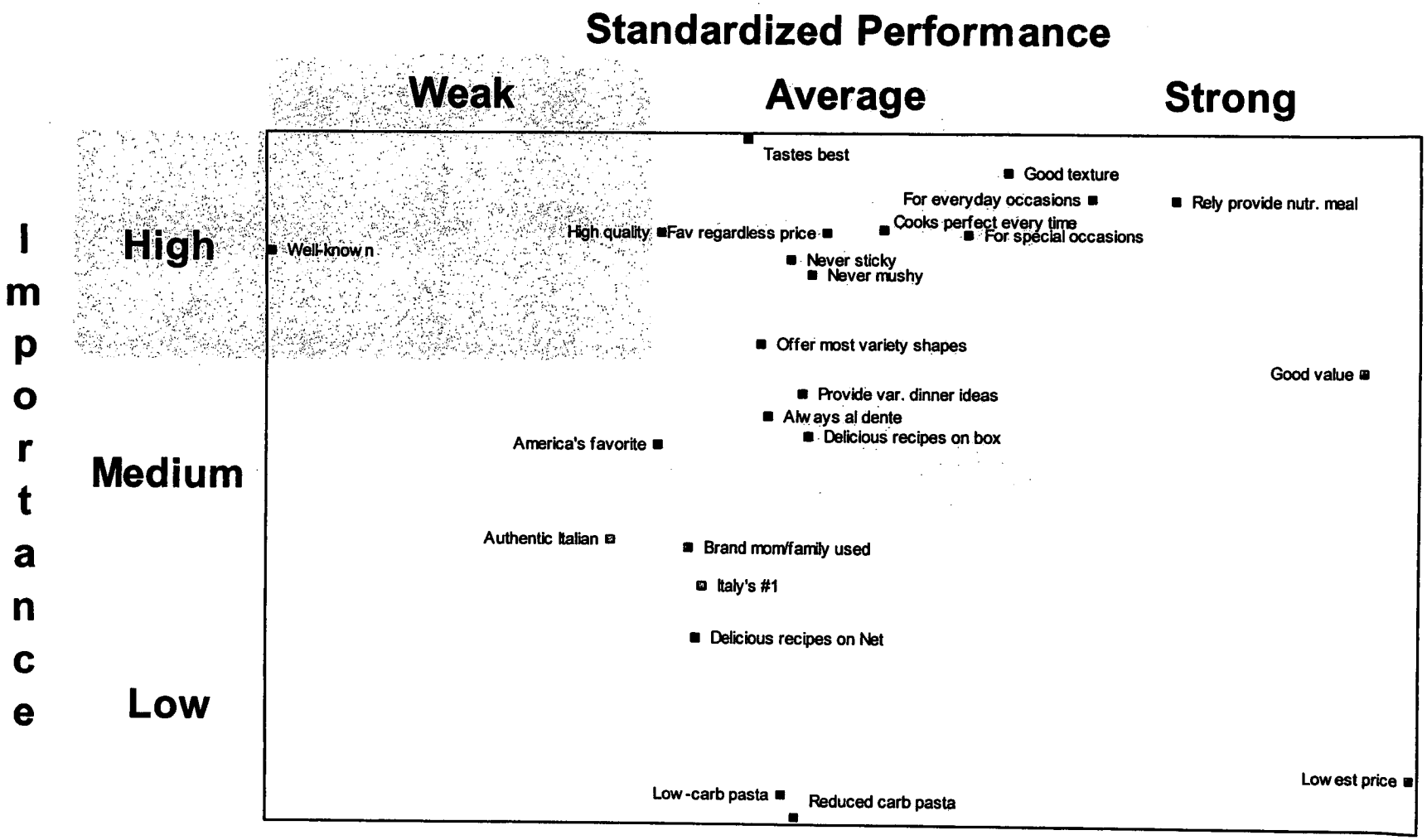
Total Muellers: Strategic Matrix – Publix



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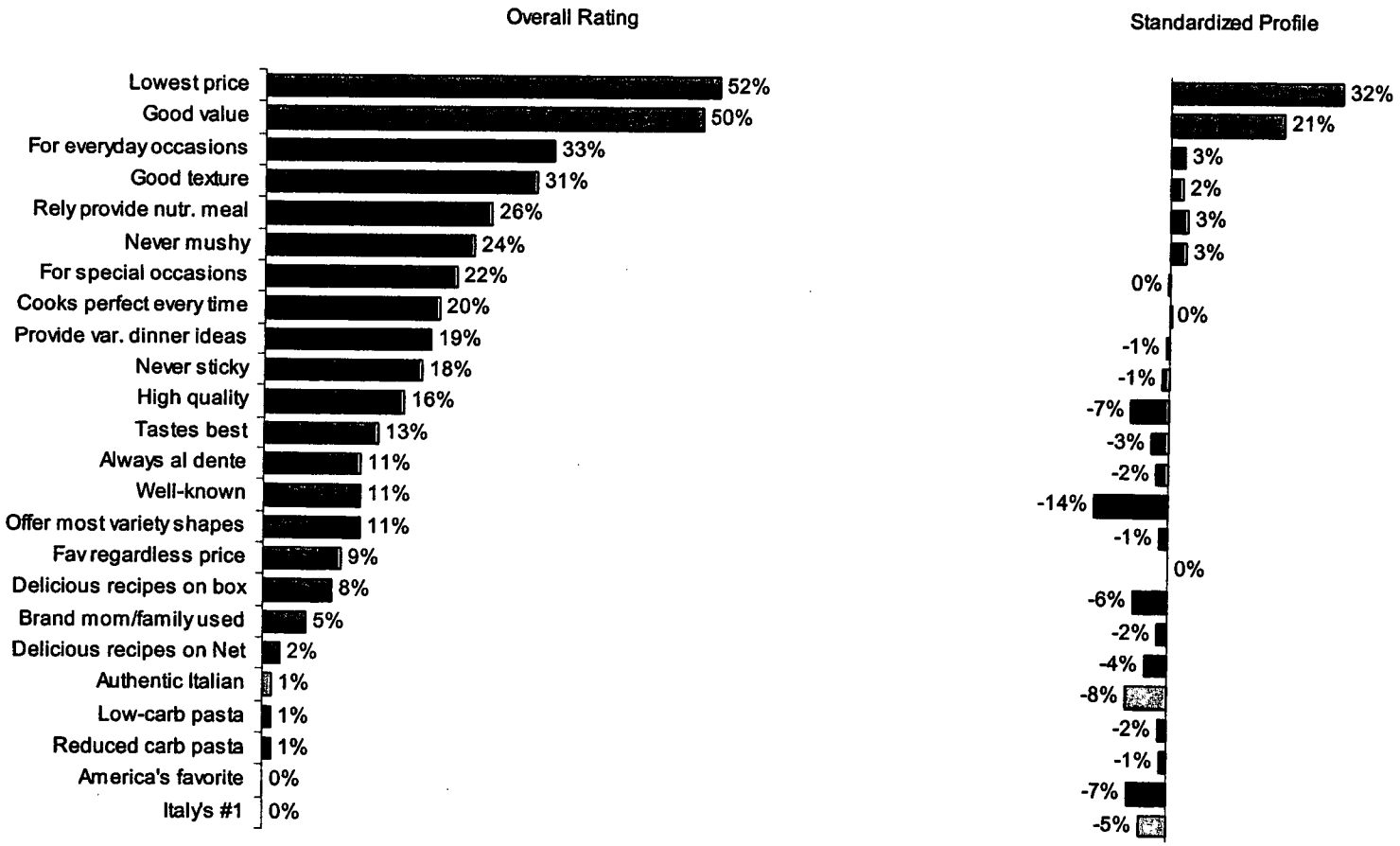
Total Muellers: Image Profile – Kroger



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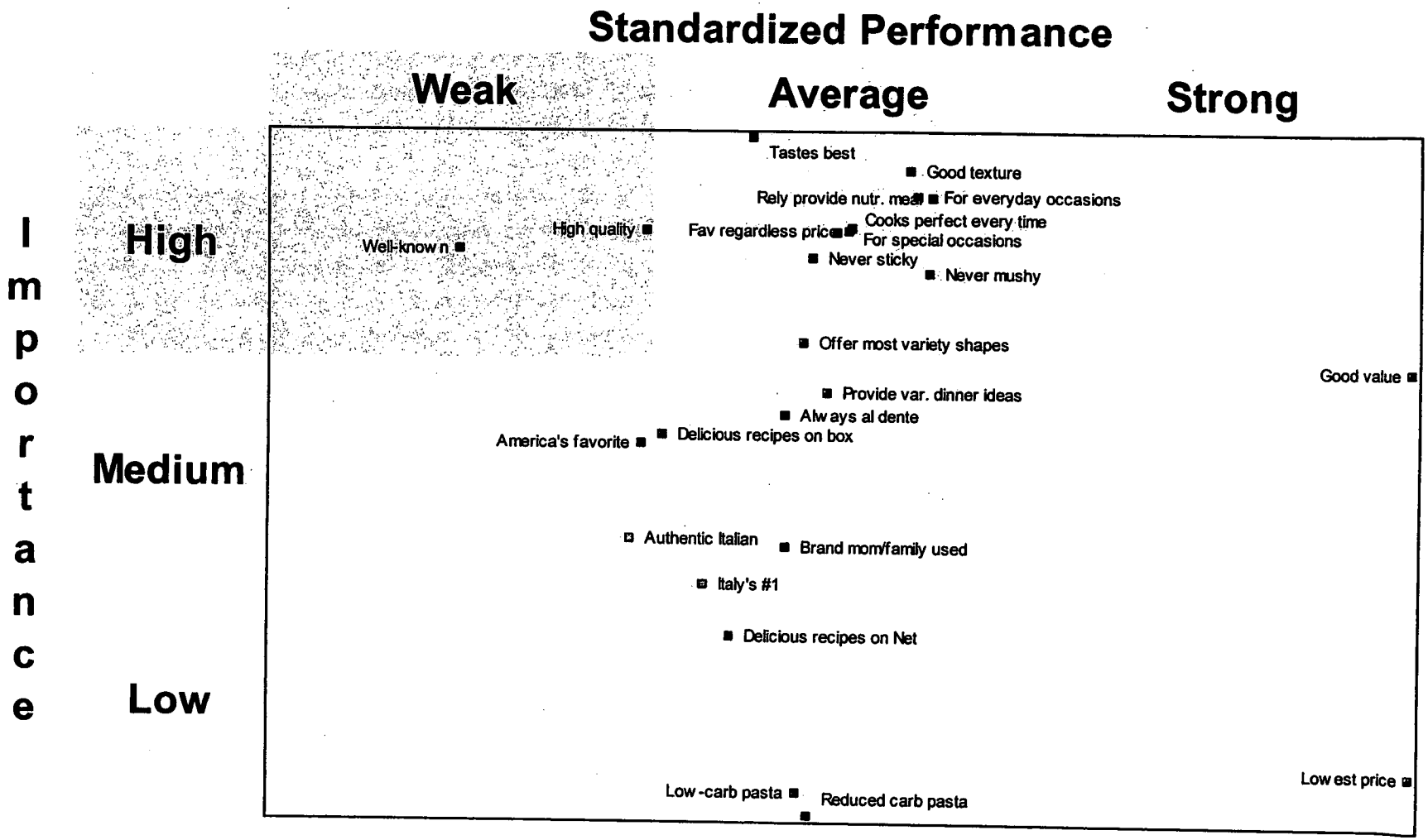
Total Muellers: Strategic Matrix – Kroger



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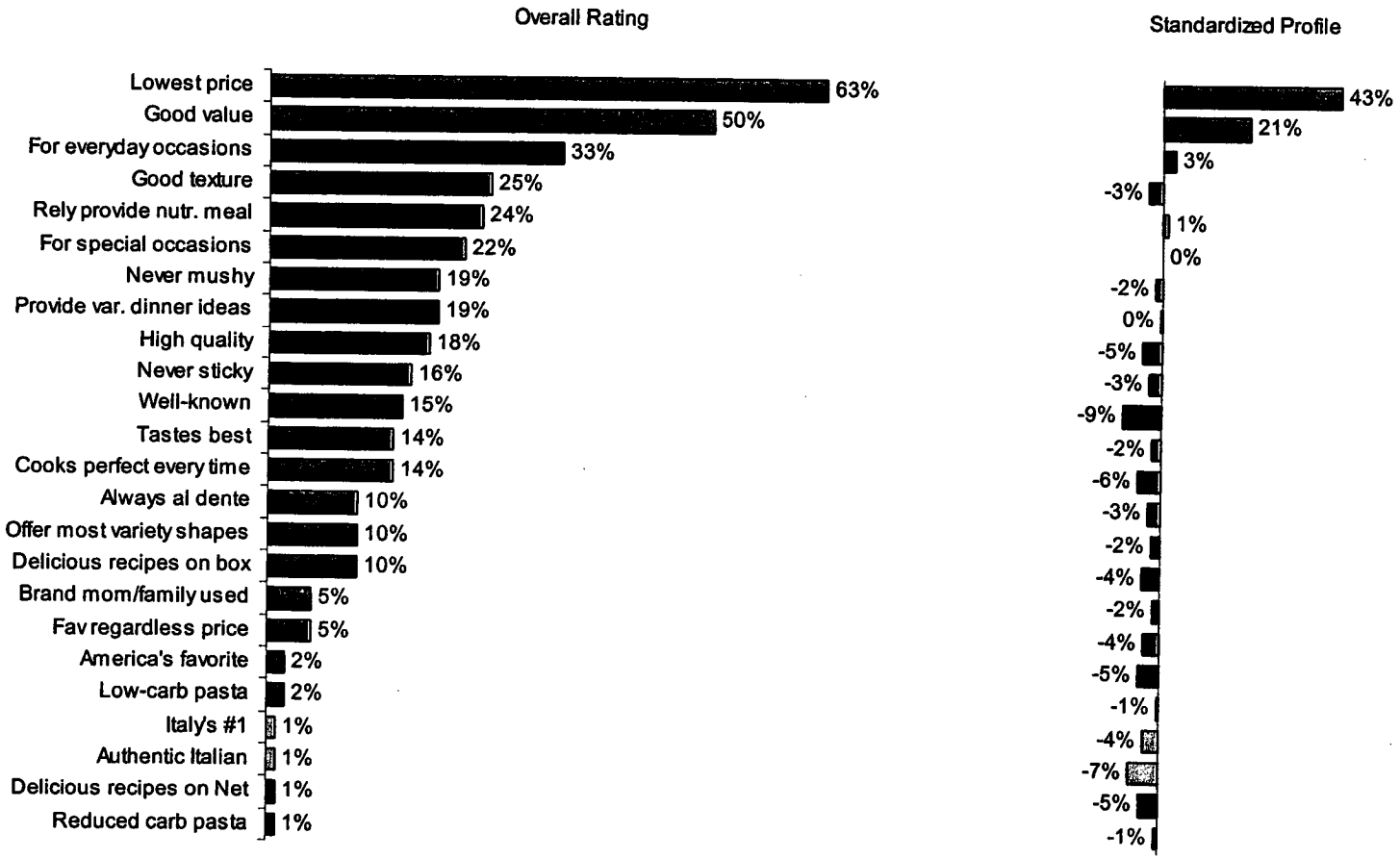
Total Muellers: Image Profile – Great Value



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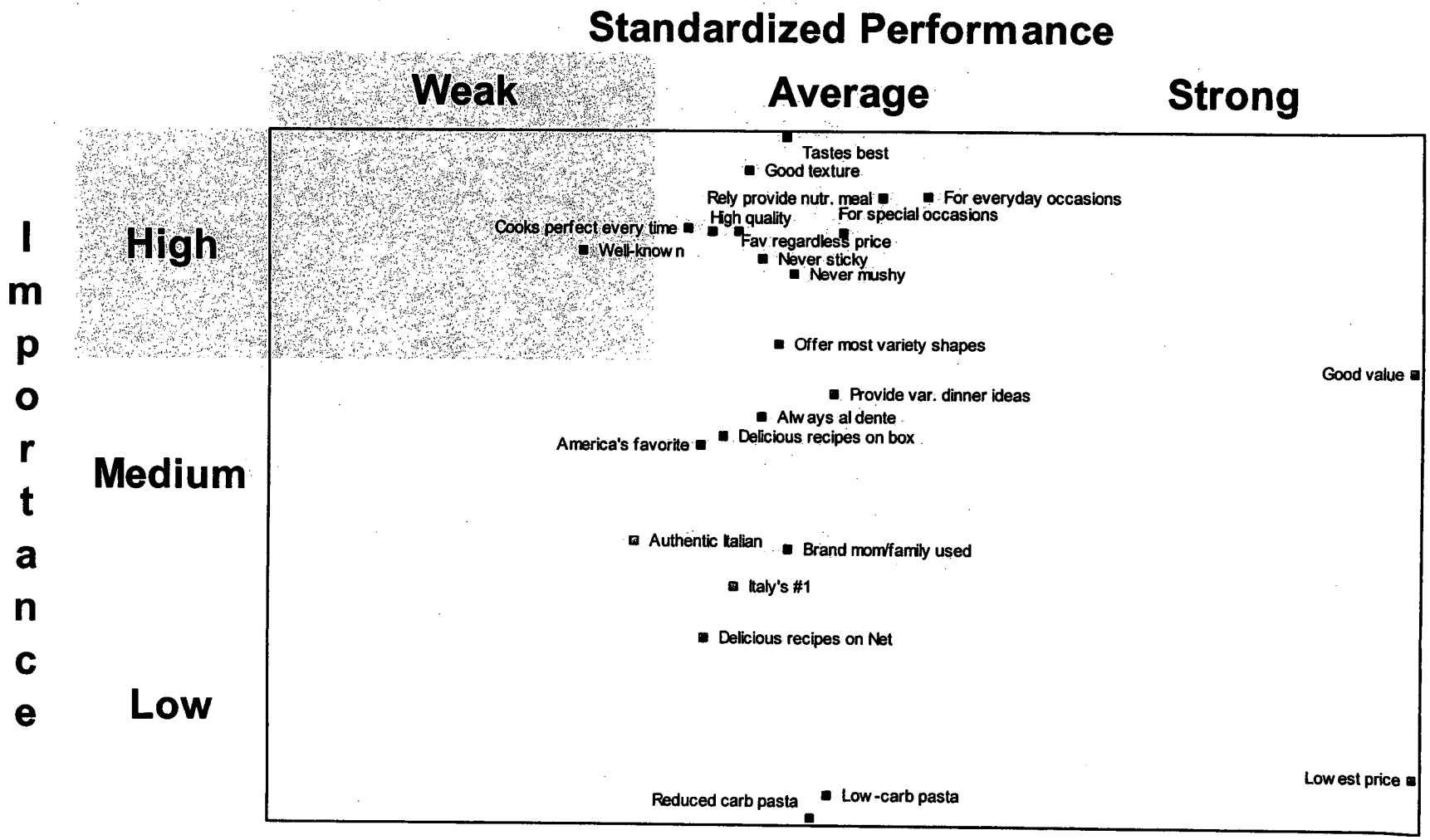
A011383

Total Muellers: Strategic Matrix – Great Value



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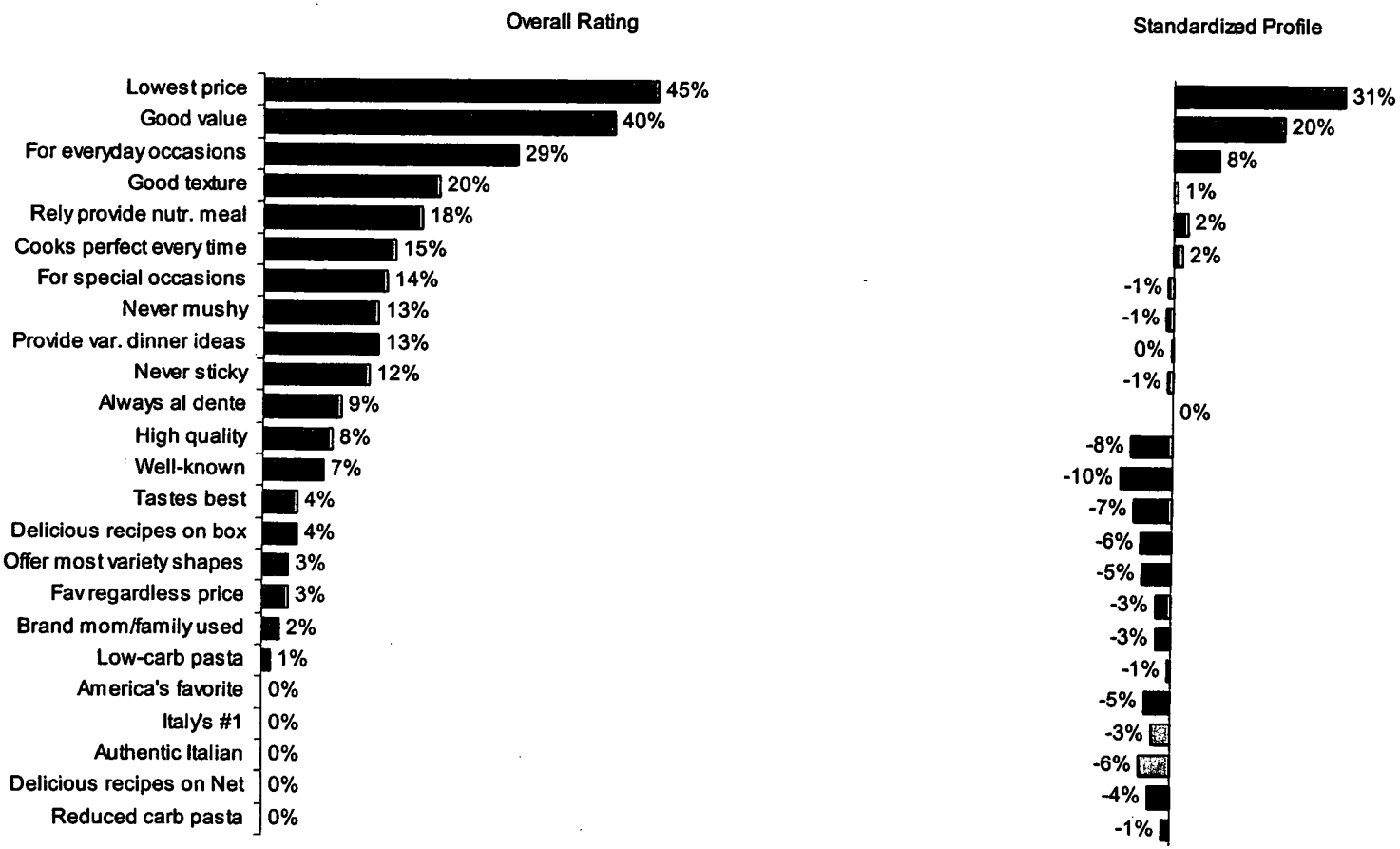
Total Mueller: Image Profile – Food Lion



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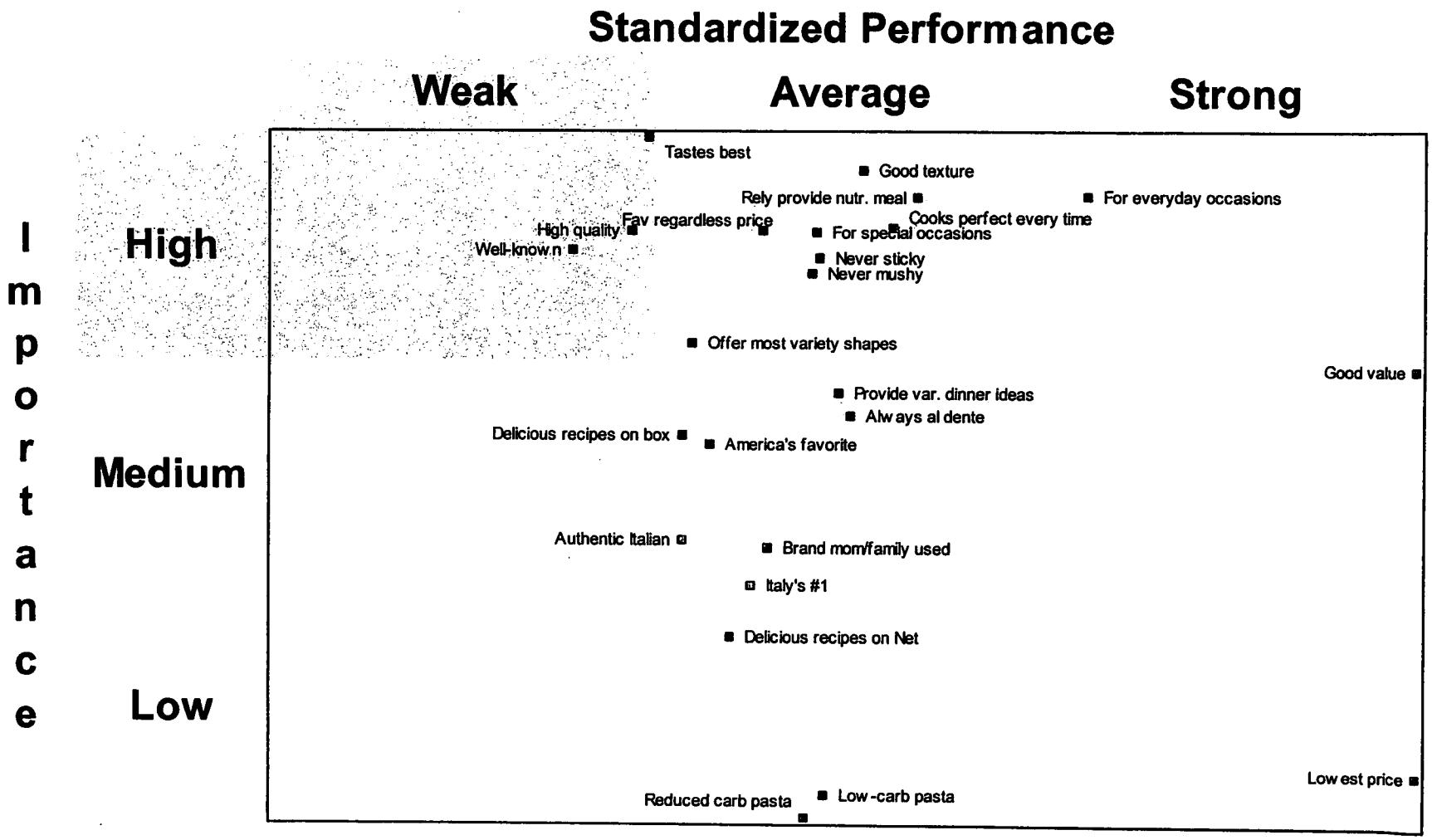
A011385

Total Muellers: Strategic Matrix – Food Lion



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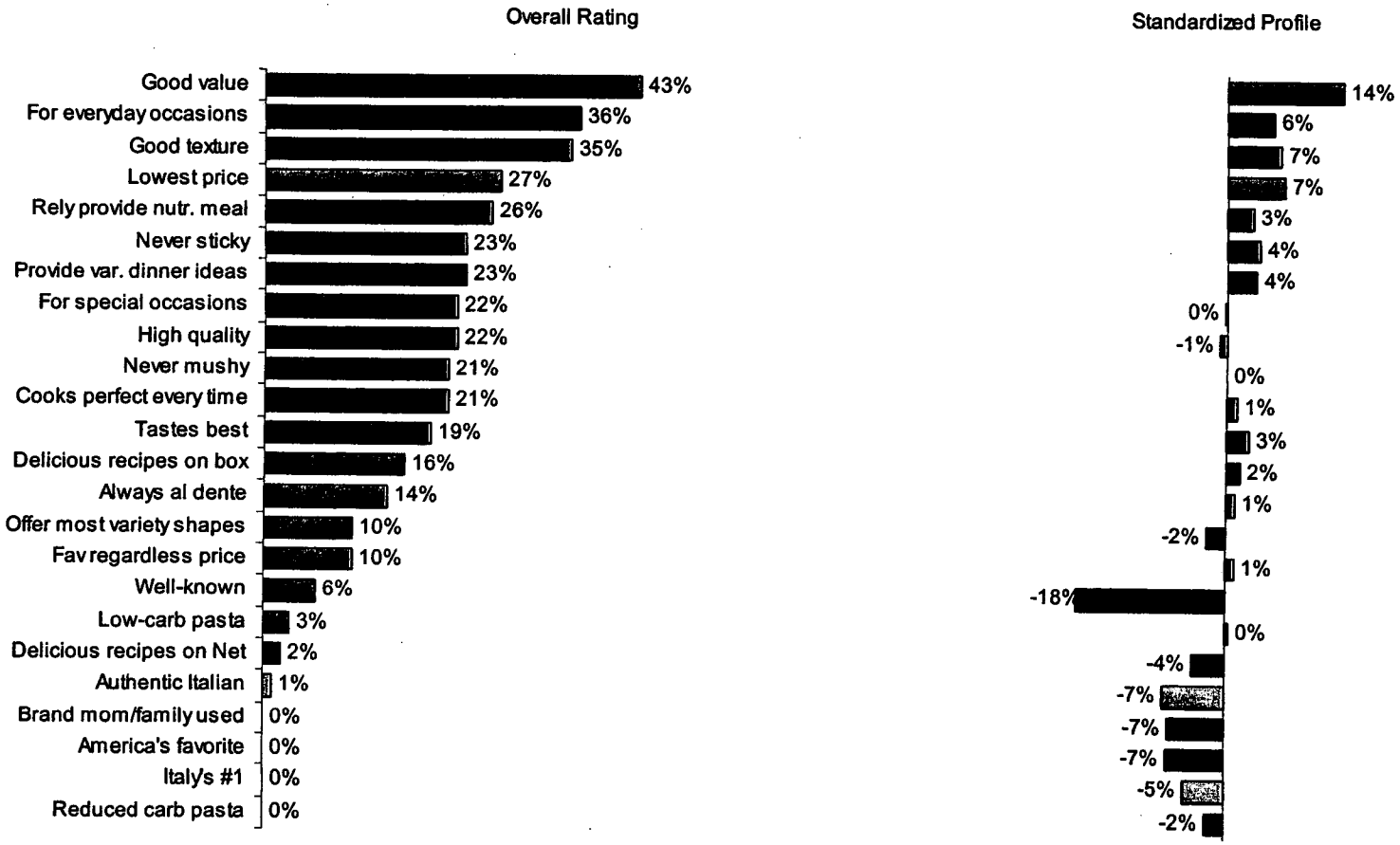
A011386

Total Muellers: Image Profile – Private Selection



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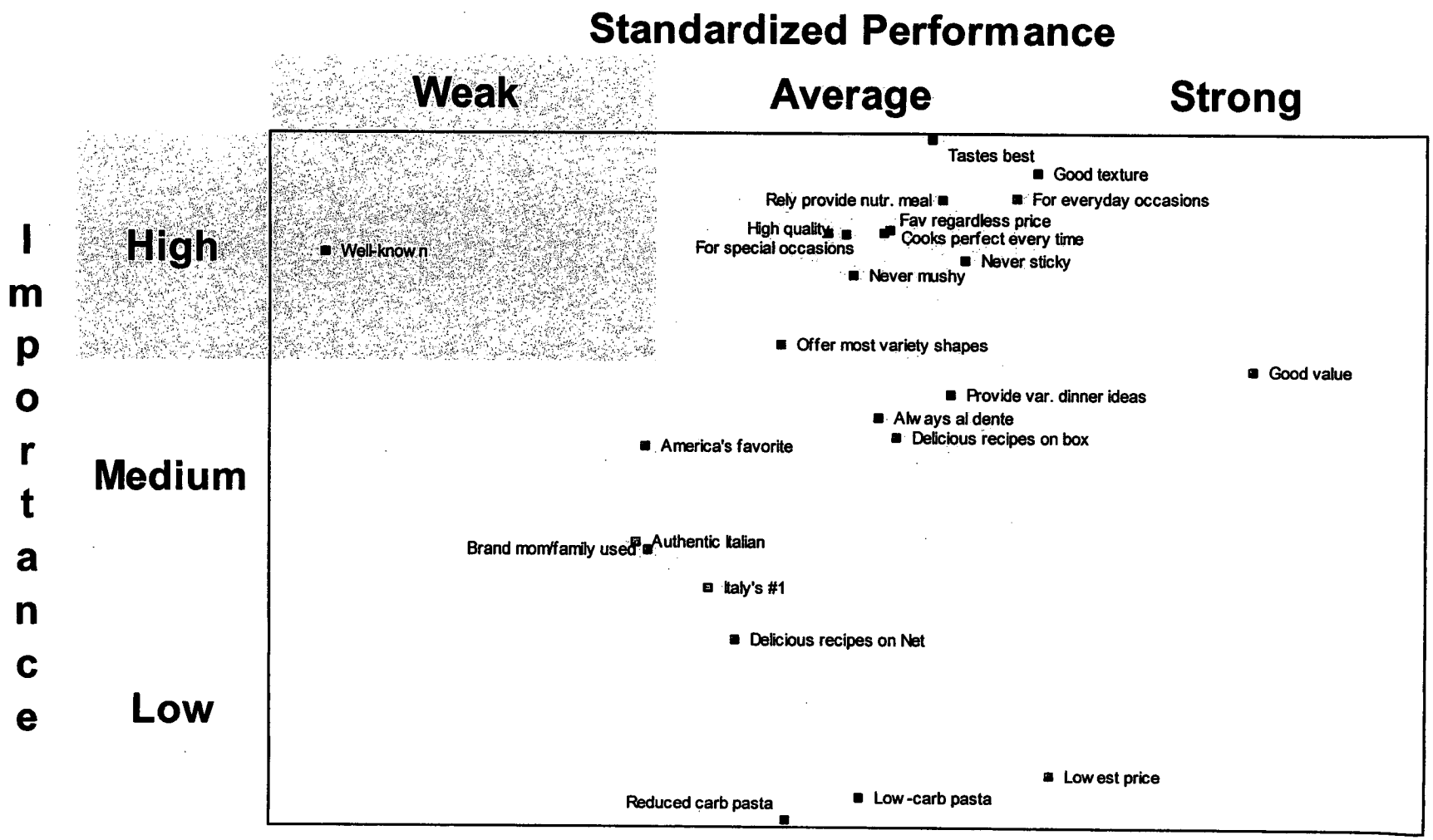
A011387

Total Muellers: Strategic Matrix – Private Selection



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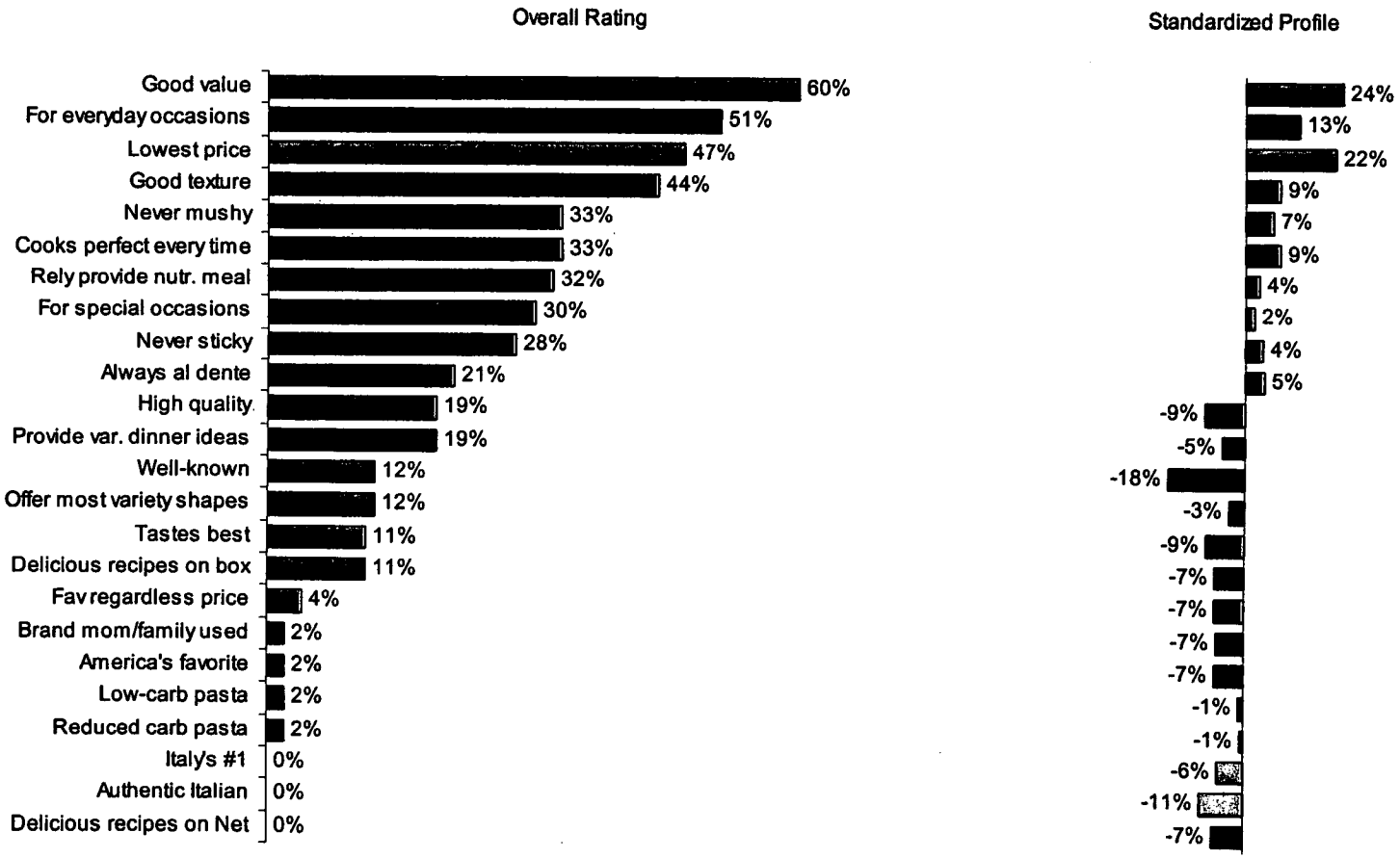
A011388

Total Muellers: Image Profile – Giant



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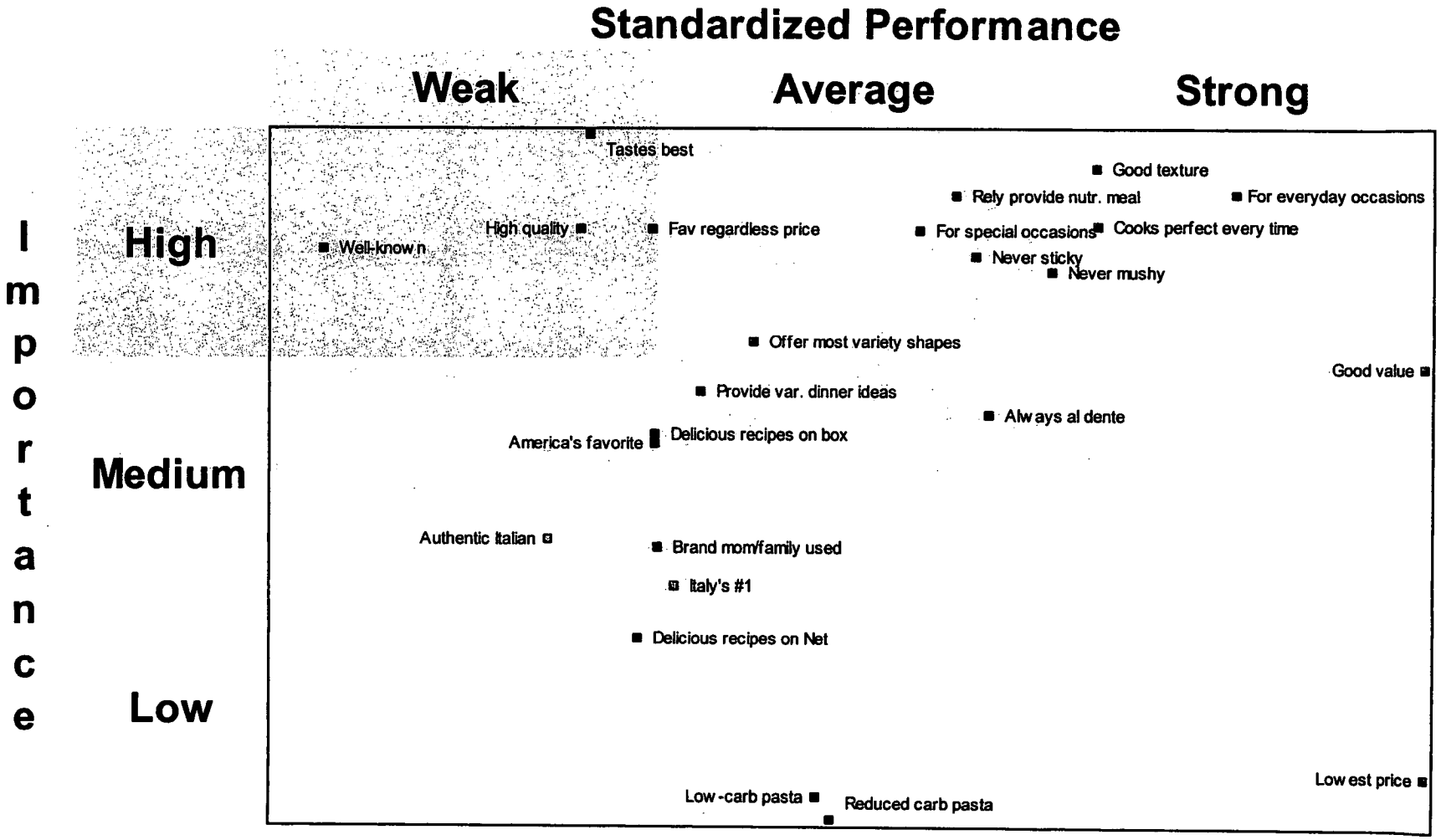
A011389

Total Muellers: Strategic Matrix – Giant



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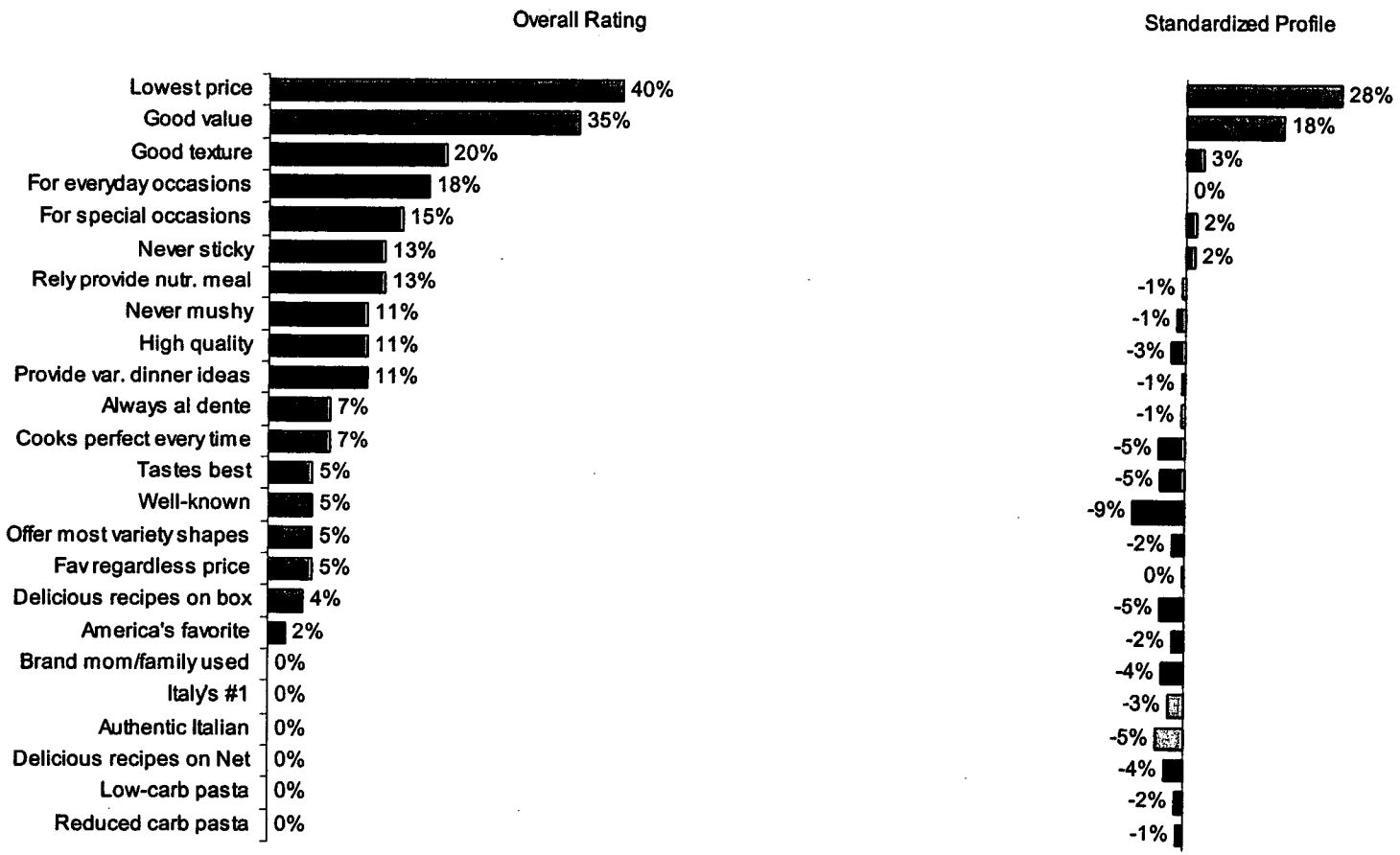
Total Muellers: Image Profile – America's Choice



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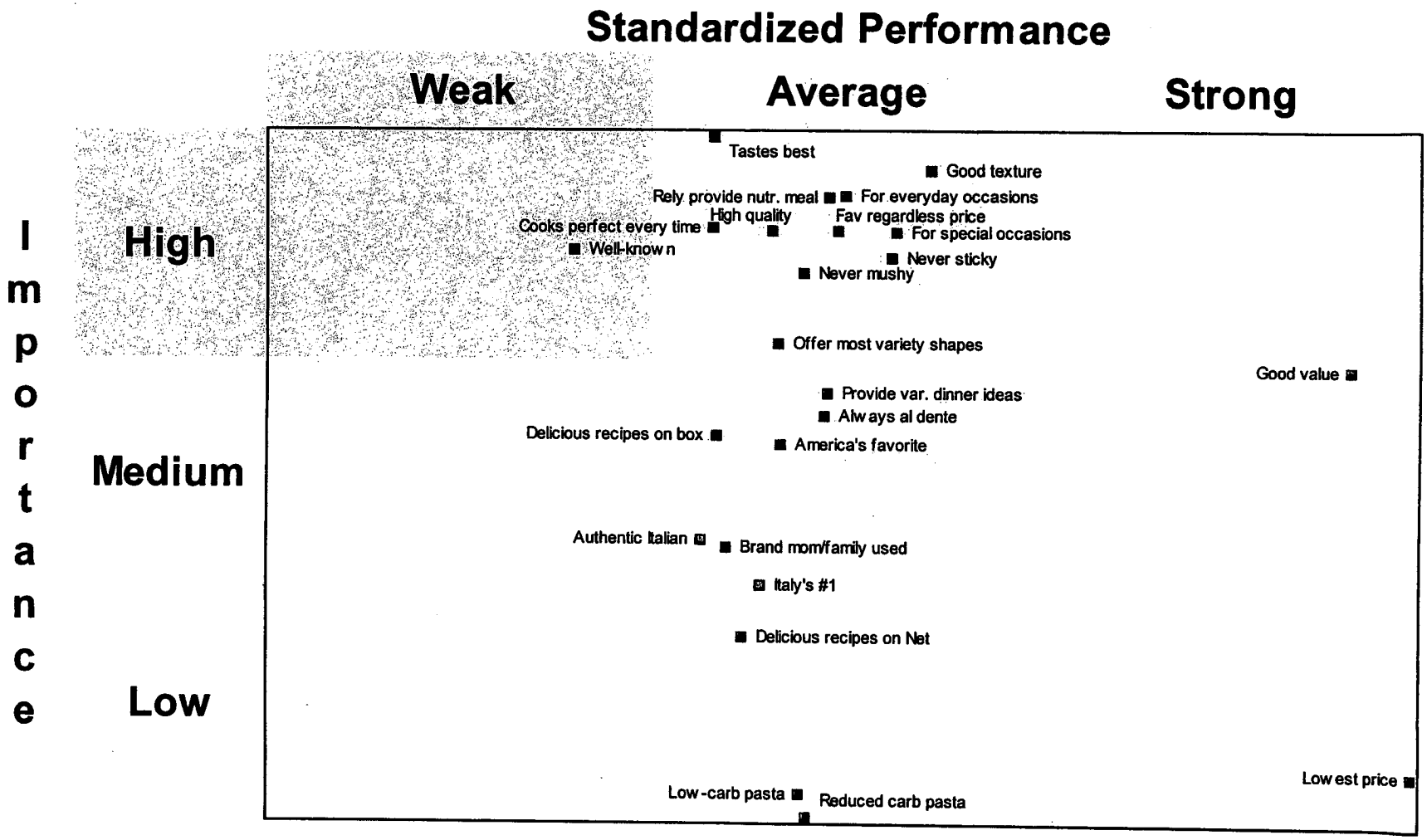
A011391

Total Muellers: Strategic Matrix – America's Choice



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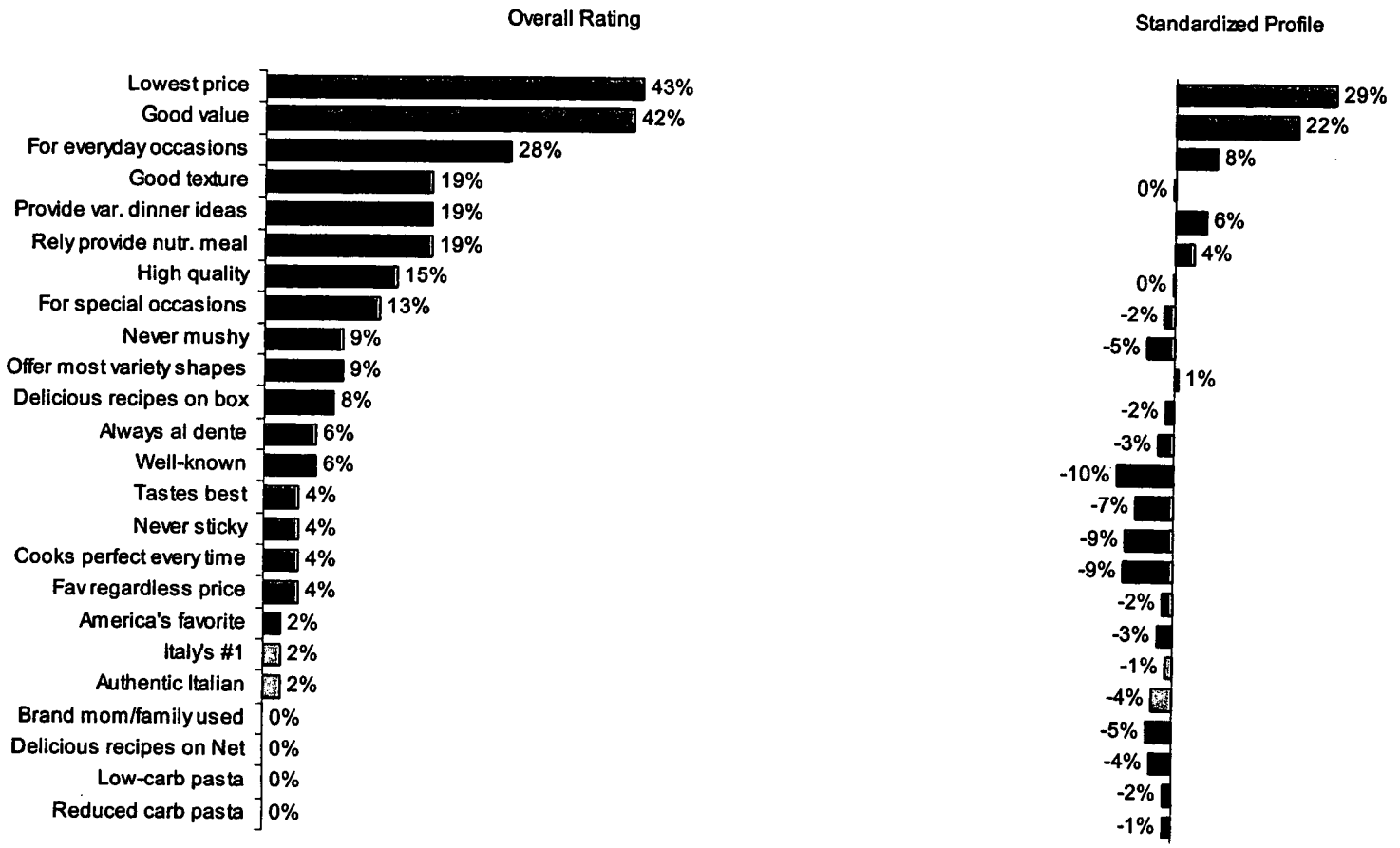
Total Muellers: Image Profile – Albertsons



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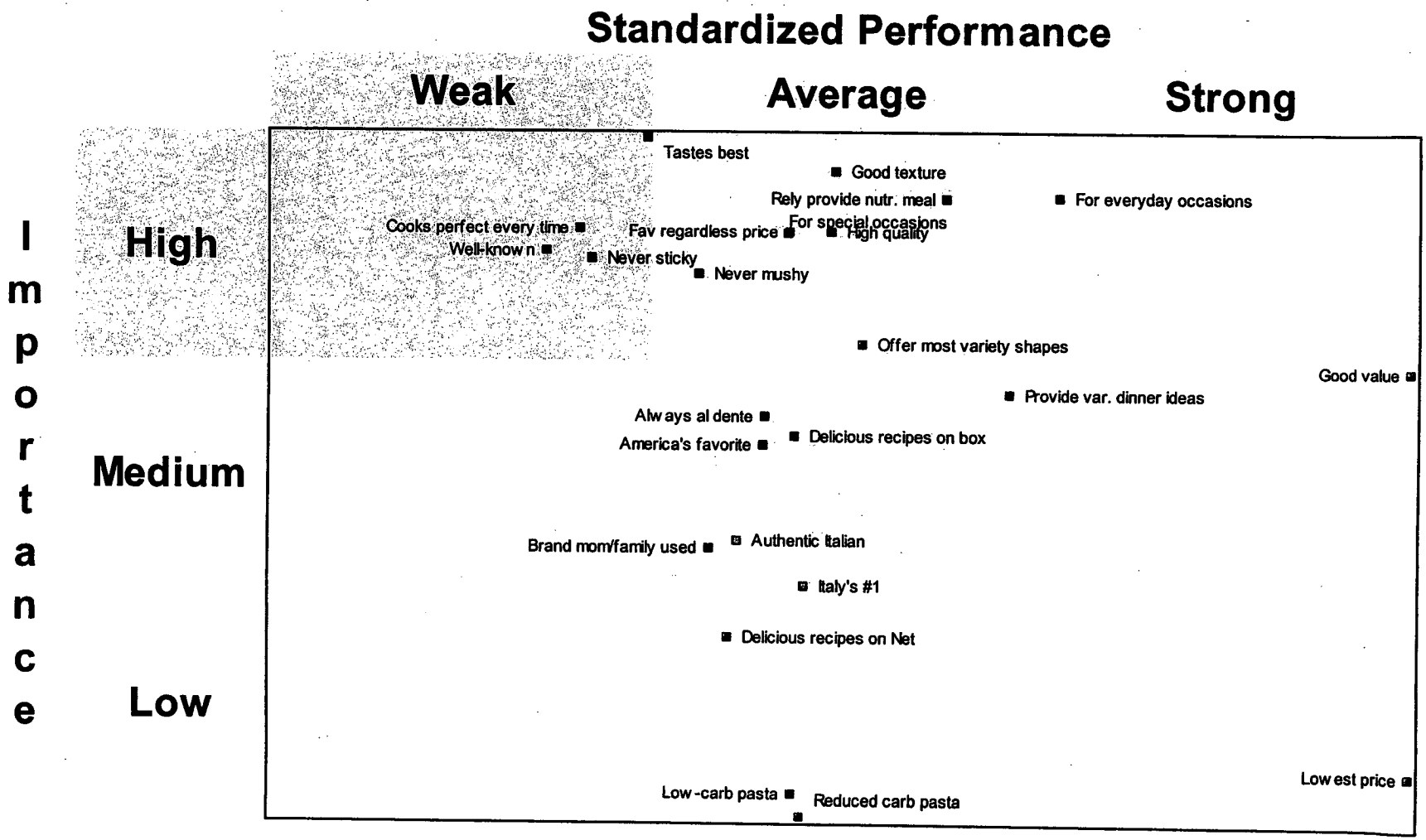
Total Muellers: Strategic Matrix – Albertsons



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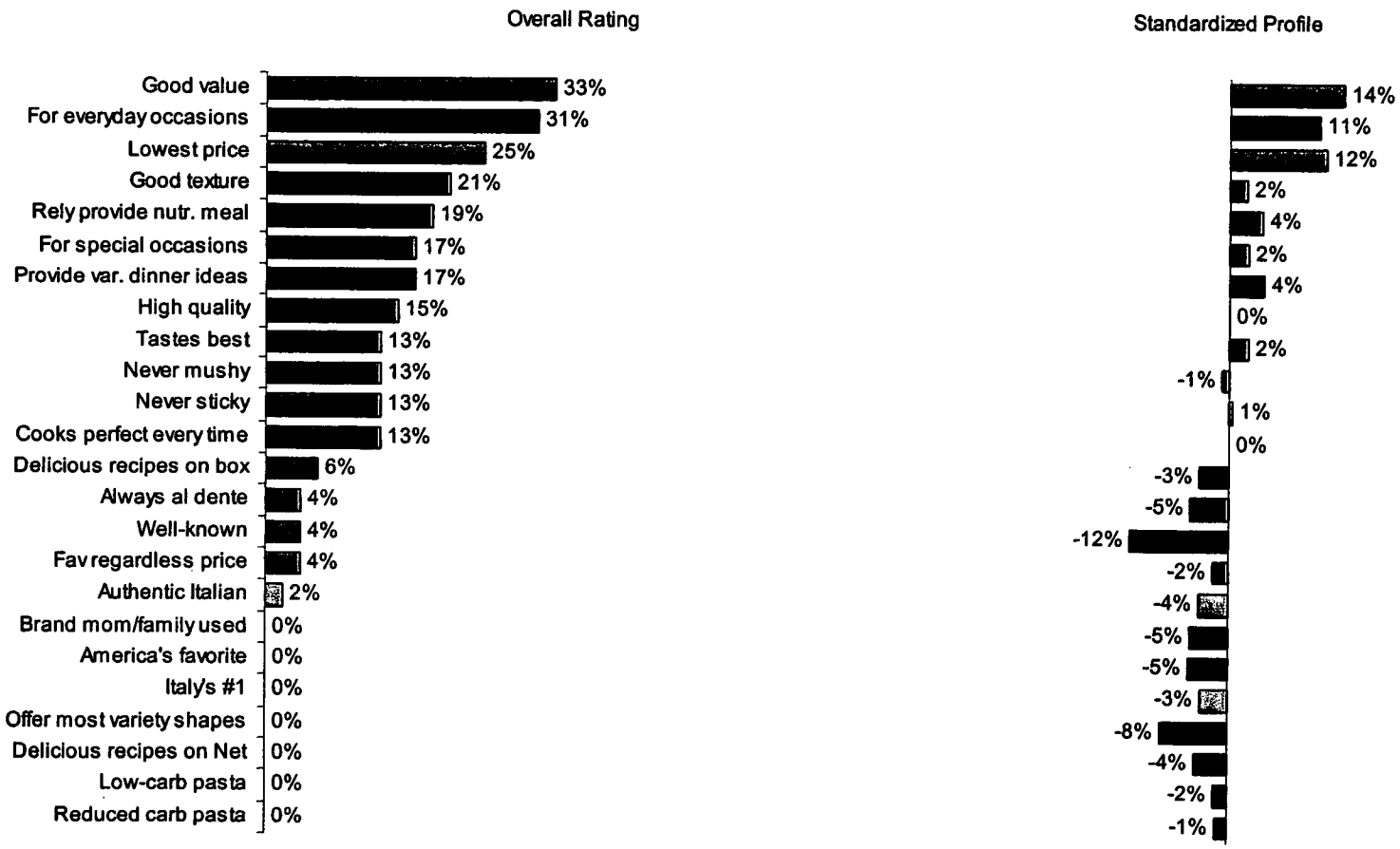
Total Muellers: Image Profile – Harris Teeter



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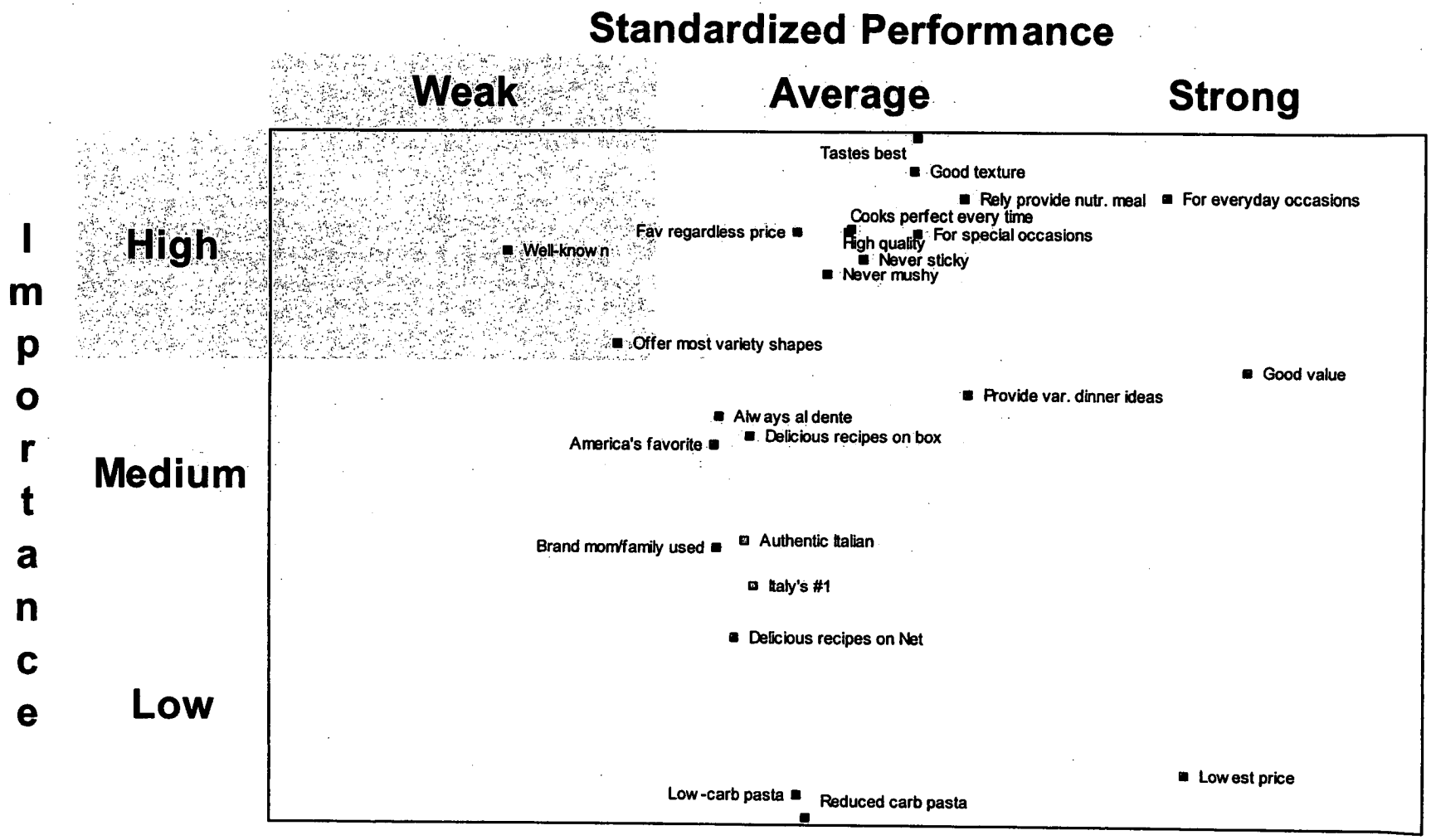
Total Muellers: Strategic Matrix – Harris Teeter



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Muellers North

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Muellers North: Summary

Muellers is the number two brand in the Muellers North territory, placing a distant second after the Barilla brand. Barilla outperforms Muellers in this region in several areas:

- Awareness of Barilla advertising far exceeds awareness of Muellers advertising.
  - Also, no one element of Muellers' advertising is particularly memorable to consumers whereas a portion of those who have seen advertising for Barilla can name that it is the authentic Italian pasta or play back the phrase 'Al Dente'.
- Awareness-to-purchase conversion rates are highest for the Barilla brand.
- When asked what brand of pasta was purchased most recently, Barilla is the single brand mentioned most often, followed by Muellers and San Giorgio.
- Barilla is the brand most often mentioned as consumers' preferred brand of pasta.
  - Mentions of Muellers are far below that of Barilla.
- Barilla is rated highest for being Italy's #1 pasta, being authentic Italian, and always being Al Dente.

Muellers users are very satisfied with the brand's performance. Two-thirds of users issue top box (extremely satisfied) ratings to the brand. Virtually all users issue top two box satisfaction ratings.

- However, Barilla generates even stronger top box satisfaction scores.
- It is important to note that light category users tend to purchase Muellers pasta while heavy and medium category users often purchase Barilla or New World Pasta brands.
  - This could be a potential problem for the Muellers brand, which is more likely to have to continually attract new users to the brand.
- Muellers is perceived as a brand that mom/family use and being one of the more well-known brands. However, it is rated relatively poorly for being an authentic Italian pasta (though this feature is only moderately important to consumers).

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Muellers North: Demographic Profile by Category Usage

Within the Muellers North region, heavy users of dry pasta come from larger households (households with more children). The households tend to have higher annual household incomes and to have a female head of household who is White and who is employed.

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Muellers North: Demographic Profile by Category Usage (continued)

	Total Muellers North	Category Usage: Heavy	Category Usage: Medium	Category Usage: Light
Base: Total Respondents	(300)	(87)*	(93)*	(109)
	A	B	C	D
	%	%	%	%
Mean Age	40.7	41.1	41.2	39.9
Marital Status				
Married	76	78	81	72
Single (Net)	24	22	19	28
Never married	15	11	10	18 C
Divorced/separated	8	9	8	9
Widowed	1	1	2	-
Employment of Female Head of Household				
Employed (Net)	79	85 D	77	75
Full time	67	71	66	65
Part time	12	14	12	10
Not Employed (Net)	18	15	22	18
Retired	1	1	1	1
Homemaker	15	11	19	16
Other	2	2	1	2
Not specified	3	-	1	6 BC
Education				
High School Graduate	18	21	16	18
Some College	24	26	27	21
College Graduate	38	37	37	39
Post Graduate	20	16	20	21
Mean Household Income (in 000s)	82.0	84.5 D	84.9 D	76.9
Mean Household Size	3.2	3.6 D	3.3	3.0
Mean Number of Children in Household Under 18	1.8	2.0 CD	1.6	1.7
Race of Female Head of Household				
White	83	93 D	87 D	74
Non-White (Net)	13	6	12	19 B
Black	8	3	5	13 BC
Asian/Pacific Islander	1	-	-	2
Other	5	2	6	5
Not specified	3	1	1	6 BC

Q. S3: Please indicate your age.
Q. S6: What is the highest level of education you have completed?
Q. S5: Which of the following best describes your total yearly household income?
Columns tested: B/C/D Capital letters indicate differences at the 90% confidence level.
Marital status, employment, household size, number of children, and race of female head of household obtained from panel data.

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Muellers North
Advertising Awareness and Recall

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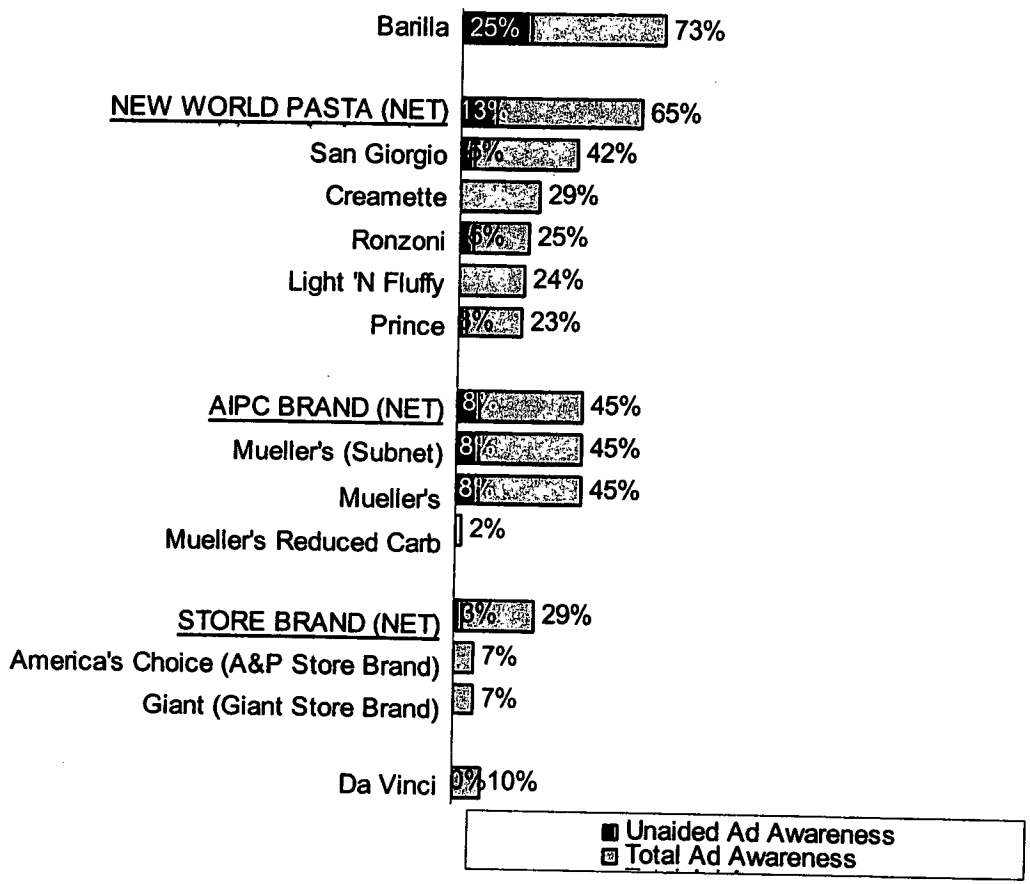
Muellers North: Ad Awareness

Barilla has the highest overall ad recognition.

- Awareness of Barilla advertising far exceeds awareness of Muellers advertising.
- Awareness of advertising for San Giorgio is similar to that of Muellers.



Q. 2 Which brands of packaged dry pasta have you seen or heard advertised in the PAST MONTH?
Q. 4 You may have already mentioned dry pasta brands you have seen or heard advertised. Using the list below, please indicate ALL dry pasta brands have you EVER HEARD OR SEEN ADVERTISED, including those brands you may have already mentioned.
Only mentions of 7 or more in either column shown except for AIPC brands which are all listed.

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Muellers North: Where Saw Advertisement

Consumers who claim to remember seeing an advertisement for Barilla or Prince pasta clearly remember doing so on television.

- Television is by far the media vehicle most often named for these two brands.

Muellers is also remembered for its TV ads, though TV is mentioned far less often for Muellers than for Barilla.

- Consumers also often mention magazines and newspapers as media sources for Muellers advertisements.

Base: Those Aware of Advertisement	Muellers (132) A %	Barilla (219) C %	Creamette (87)* F %	Light N' Fluffy (73)* G %	Prince (66)* I %	Ronzoni (74)* J %	San Giorgio (124) K %	Store Brand (Net) (85)* M %
TV	42 F	77 AFGI JK	28	34	65 AFG K	53 FG	51 FG	16
Magazine	30 CIK	11	23 CI	26 CI	12	23 CI	19 C	4
Newspaper	29 CI	17	25 CI	30 CI	12	23 I	25 CI	53
Saw it in store	5	3	6	3	5	3	2	18
Friend/relative/business associate	3	2	5 K	4	3	4	1	11
Radio	2	11 AFG K	2	-	6 AG	7 AG	6 AG	5
Not sure	18 C	6	23 C	22 C	14 C	15 C	16 C	22

Q. 5A For each brand you have heard or seen advertised, please indicate where you saw or heard the advertising for each brand.
Q. 5B What other place did you see or hear [INSERT BRAND] advertised?
Columns tested: A/C/F/G/I/J/K/M. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.
Only mentions of 3% or more in any column shown.

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Muellers North: Ad Recall and Communication

No one element of Muellers' advertising is particularly memorable to consumers.
- Over four in ten consumers say they don't know or can't remember anything about the Muellers ad.

A full one-third of consumers mention 'Prince Spaghetti Day' in connection with ads for the Prince brand.
- This is extremely high unaided recall for a specific ad element.

Roughly one in ten consumers who remember seeing a Barilla ad play back the fact that it features authentic Italian pasta or the phrase 'Al Dente'.

Light 'N Fluffy ads are remembered because they communicate that the product is comprised of egg noodles.

Consumers often mention that ads for store brands are price-related.

Base: Those Aware of Advertisement	Muellers (132) %	Barilla (219) %	Creamette (87)* %	Light N' Fluffy (73)* %	Prince (66)* %	Ronzoni (74)* %	San Giorgio (124) %	Store Brand (Net) (85)* %
AD RECALL (NET)	20	29	11	21	48	18	22	37
Sale ad	2	0	-	-	-	-	2	9
TV/Television commercials	2	7	3	7	9	4	4	1
Store flyer	1	-	1	1	-	3	1	12
Seeing it in store	5	1	2	7	2	-	2	16
Specifics of Barilla TV ad recalled	-	8	-	1	-	-	-	-
Prince Spaghetti Day (Wednesday)	-	-	-	-	35	-	-	-
All other ad recall mentions	6	5	1	-	5	5	6	2
PRICE/COST (NET)	15	6	10	7	8	8	10	44
Price/cost (unsp)	2	1	-	-	3	1	1	10
Low price	1	-	1	-	-	-	-	7
On sale	5	1	5	4	3	4	2	20

Q. 5C What SPECIFICALLY do you recall seeing or hearing about the pasta advertising for [INSERT BRAND]?
Stats testing not appropriate on open-ended questions.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.
Only mentions of 7% or more in any column shown.

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Muellers North: Ad Recall and Communication (continued)

Base: Those Aware of Advertisement	Muellers (132) %	Barilla (219) %	Creamette (87)* %	Light N' Fluffy (73)* %	Prince (66)* %	Ronzoni (74)* %	San Giorgio (124) %	Store Brand (Net) (85)* %
PASTA (NET)	10	16	7	19	6	7	8	4
Noodles/egg noodles	2	-	-	14	-	-	-	-
Authentic/Italian pasta	-	11	-	-	-	4	4	1
PACKAGING (NET)	6	1	9	1	-	1	4	2
Green box	-	-	7	-	-	-	-	1
BRAND (NET)	5	11	8	1	3	8	8	2
Barilla name/brand name	1	11	8	1	3	7	7	1
PRODUCT ATTRIBUTES (NET)	2	7	2	27	2	4	2	1
All other product attributes mentions	1	3	1	12	2	3	1	-
TASTE/FLAVOR (NET)	1	5	5	3	2	-	1	5
MISCELLANEOUS (NET)	8	24	10	10	6	14	10	-
Al Dente	-	9	-	-	-	-	-	-
Doesn't stick together	-	8	2	1	-	-	-	-
Don't Know	28	12	29	14	18	24	25	14
None/nothing	13	7	13	4	15	18	15	21

Q. 5C What SPECIFICALLY do you recall seeing or hearing about the pasta advertising for [INSERT BRAND]?
Stats testing not appropriate on open-ended questions.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.
Only mentions of 7% or more in any column shown.

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Muellers North: Recognition of AIPC Brands' Advertising

Roughly one-third of consumers report being aware of an ad featuring a family eating a pasta meal or one that gives quick and easy pasta meal ideas (AIPC's ads).

- However, among those that claim awareness, only 6% attribute the ad to Muellers. Most who name an associated brand credit Barilla with the ad.

Roughly one in four consumers who are aware of Mueller's advertising are aware of the "Muellers makes the meal, you made the difference" tagline.

Muellers North: Recognition of AIPC Brands' Advertising (continued)

	Total Muellers North	Past 6 Months Brand Usage				
		Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
	A	L	M	N	O	P
	%	%	%	%	%	%
Whether Remember AIPC Ad Based on Description						
Base - Those Aware of Any Advertisement	(251)	(119)	(139)	(91)*	(51)*	(114)
Yes	34	35	34	32	37	42
No	66	65	66	68	63	58
Brand Associated with Advertisement						
Base - Those Aware of Any Advertisement and Recall AIPC Ad	(86)*	(42)*	(47)*	(29)**	(19)**	(48)*
Barilla	29	26	32			31
NEW WORLD PASTA (NET)	21	21	15			13
Prince	7	10	4			4
Ronzoni	6	-	4			2
San Giorgio	6	7	4			2
AIPC BRAND (NET)	6	10	6			8
Mueller's (Subnet)	6	10	6			8
Mueller's	6	10	6			8
Kraft	2	5	-			2
Other pasta brand	9	5	9			6
Don't Know/Remember	33	33	40			38
Aided Awareness of Mueller's Slogan						
Base - Those Aware of Mueller's Advertisement	(132)	(68)*	(69)*	(51)*	(27)**	(54)*
Yes	22	29	23	24		22
No	78	71	77	76		78

Q. 6A Do you remember seeing a pasta advertisement featuring a family eating a pasta meal or one that gives quick and easy pasta meal ideas?
Q. 6B What brand of pasta was being advertised?
Q. 6C Have you heard of the phrase [INSERT AIPC BRAND] MAKES THE MEAL, YOU MAKE THE DIFFERENCE in a pasta advertisement?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
** Base size too small to analyze.
Only mentions of 5% or more in any column shown (for Q. 6B).
Stats testing not appropriate on open-ended questions (Q. 6B).

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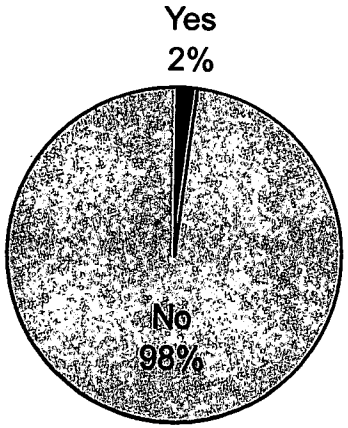
Muellers North: Aided Awareness of AIPC Website

Only 2% of consumers are aware of www.makesameal.com.

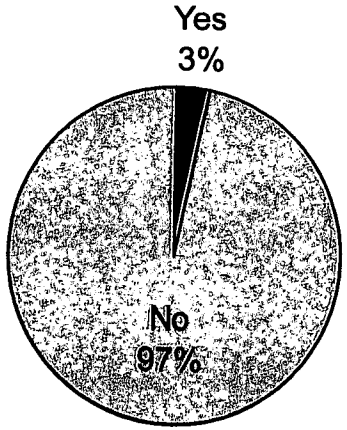
- Additionally, only 3% of past 6 month Muellers users are aware.

Whether Heard About or Visited Makesameal.com

Total Muellers North



Past 6 Months Muellers Users



Q. 6D Have you heard about or visited the web site MakesaMeal.com?
NOTE: Base sizes for frequency of visiting AIPC website too small to analyze.

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Muellers North: Recognition of Barilla Advertising

Roughly one-third of consumers report being aware of an ad featuring authentic Italian recipes (Barilla's ads). This awareness is similar to that reported for the AIPC ad.

- Here, however, consumers correctly associate the ads with Barilla, as over six in ten of those who are aware of the ad based on the description can name Barilla as the sponsor.

	Total Muellers North	Past 6 Months Brand Usage				
		Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
	A	L	M	N	O	P
	%	%	%	%	%	%
Whether Remember Barilla Ad Based on Description						
Base - Those Aware of Any Advertisement	(251)	(119)	(139)	(91)*	(51)*	(114)
Yes	37	37	43	37	41	45
No	63	63	57	63	59	55
Brand Associated With Advertisement						
Base - Those Aware of Any Advertisement and Recall Barilla Ad	(92)*	(44)*	(60)*	(34)*	(21)**	(51)*
Barilla	61	61	65	71		61
NEW WORLD PASTA (NET)	12	14	8	15		10
San Giorgio	8	7	5	12		8
Ronzoni	4	7	3	3		2
STORE BRAND (NET)	3	5	3	-		6
Wegmans (Wegmans Store Brand)	3	5	3	-		6
Other pasta brand	5	5	5	3		6
Don't Know/Remember	14	14	13	6		12

Q. 7A Do you remember any type of pasta advertising featuring authentic Italian recipes and pasta from Italy?
Q. 7B What brand was being advertised?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
** Base size too small to analyze.
Only mentions of 5% or more in any column shown (for Q. 7B).
Stats testing not appropriate on open-ended questions (Q. 7B).

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Muellers North
Brand Awareness and Purchase Behavior

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Muellers North: Brand Awareness

Most consumers are aware of Barilla as well as one or more brands of AIPC, New World Pasta, and Store Brand pasta.

- Here, awareness of Muellers is similar to that of Barilla.
  - Roughly half of consumers mention Muellers when asked to name specific brand(s) of packaged dry pasta (unaided).
- Within the New World Pasta portfolio of brands, San Giorgio is the brand with the highest awareness, followed by Ronzoni.

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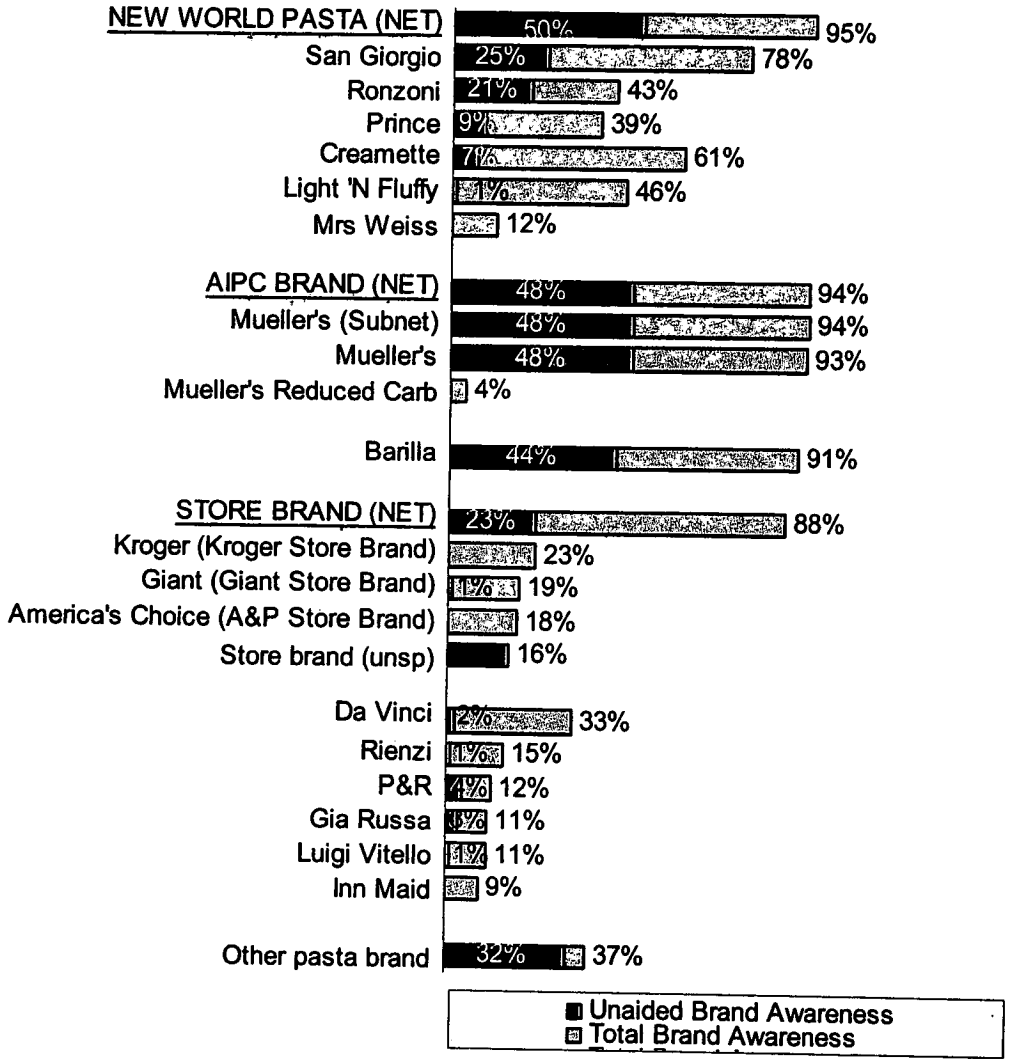
Muellers North: Brand Awareness (continued)



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Q. 1 Thinking about brands of packaged dry pastas, which pasta brands come to mind?
Q. 3 You may have already mentioned some dry pasta brands you have heard of. Using the list below, please indicate ALL of the following dry pasta brands you have EVER heard of, including those brands you may have already mentioned.
Only brands with mentions of 7% or more in either column shown except for AIPC brands which are all listed. Only store brands with 15% or more total awareness shown.

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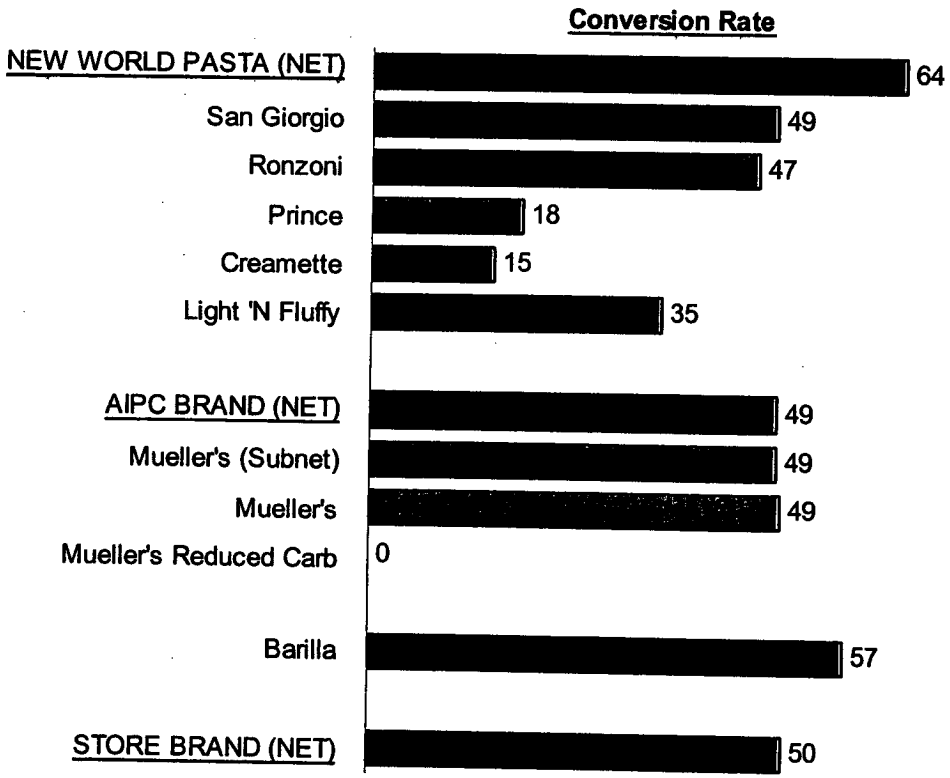
Muellers North: Awareness-To-Purchase Conversion Rates

Conversion rates are highest for the Barilla brand.

- Conversion rates for Muellers are at parity with the two key New World Pasta competitors, San Giorgio and Ronzoni.



	Total Brand Awareness	% Purchased Past 6 Months
NEW WORLD PASTA (NET)	95	61
San Giorgio	78	38
Ronzoni	43	20
Prince	39	7
Creamette	61	9
Light 'N Fluffy	46	16
AIPC BRAND (NET)	94	46
Mueller's (Subnet)	94	46
Mueller's	93	46
Mueller's Reduced Carb	4	0
Barilla	91	52
STORE BRAND (NET)	88	44

Q. 1 Thinking about brands of packaged dry pastas, which pasta brands come to mind?
Q. 3 You may have already mentioned some dry pasta brands you have heard of. Using the list below, please indicate ALL of the following dry pasta brands you have EVER heard of, including those brands you may have already mentioned.
Q. 8A Which of the following pasta brands have you purchased in the PAST 6 MONTHS?
Only AIPC brands and major competitors listed.
Conversion ratio calculated as follows: % Purchased Past 6 Months/Total Brand Awareness x 100.

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Muellers North: Past 6 Months Cross-Brand Purchasing

Among those who have purchased Muellers pasta in the past 6 months, half have also purchased Barilla.

- Roughly half have purchased Store Brands of pasta.
- Four in ten have purchased San Giorgio.

However, none of the other brands appear to have a more loyal user base.

- Among Barilla purchasers, nearly half have also purchased Muellers pasta and over one-third have purchased San Giorgio.

	Total Muellers North	Past 6 Months Brand Usage				
		Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
Base: Total Respondents	(300)	(138)	(157)	(114)	(59)*	(133)
	A	L	M	N	O	P
	%	%	%	%	%	%
NEW WORLD PASTA (NET)	61	63	62	100 LMP	100 LMP	60
San Giorgio	38	40	36	100 LMOP	51 M	38
Ronzoni	20	14	21	26 LP	100 LMNP	17
Light 'N Fluffy	16	16	22	19	25	17
Creamette	9	12	11	12	5	11
Prince	7	14 NP	8	5	7	6
Mrs Weiss	1	-	1	1	-	1
Barilla	52	51 MNO	100 LNOP	49	56	54
AIPC BRAND (NET)	46	100 P	45	48 O	34	50 O
Mueller's (Subnet)	46	100 P	45	48 O	34	50 O
Mueller's	46	100 P	45	48 O	34	50 O
Mueller's Reduced Carb	0	-	1	-	-	-
STORE BRAND (NET)	44	49	46	45	39	100 LMN O
Tops (Tops Market Store Brand)	7	8 NO	8 NO	2	-	15 O
Giant (Giant Store Brand)	6	7	5	7	3	14 O
Wegmans (Wegmans Store Brand)	6	8 NO	8 NO	1	2	13 NO
Kroger (Kroger Store Brand)	5	7 O	6 O	6 O	-	12 MO
Giant Eagle (Giant Eagle Store Brand)	5	4	4	8 O	-	11 LMO
Great Value (Wal-Mart Store Brand)	3	3	3	3	3	8 LMN
Food Lion (Food Lion Store Brand)	3	5	2	4	3	7 M
Shop Rite (Shop Rite Store Brand)	3	2	4	3	10 LMN	6
P & R	5	7 N	6 N	-	3 N	9 N
Da Vinci	5	5	7	4	7	5
Luigi Vitelli	3	2	4	3	10 LMNP	3

Q. 8A Which of the following pasta brands have you purchased in the PAST 6 MONTHS?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 7% or more in any column shown except for AIPC brands which are all listed.

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Muellers North: Brands Purchased Most Recently

When asked what brand of pasta was purchased most recently, Barilla is the single brand mentioned most often, followed by Muellers and San Giorgio.

- New World Pasta brands and Store Brands tend to be purchased by heavy category users.

		Category Usage		
	Total Muellers North	Heavy	Medium	Light
Base: Total Respondents	(300)	(87)*	(93)*	(109)
	A	B	C	D
	%	%	%	%
NEW WORLD PASTA (NET)	33	39 D	32	28
San Giorgio	18	21	17	16
Ronzoni	11	16 D	12 D	5
Light 'N Fluffy	4	6	4	3
Barilla	28	41 CD	24	21
STORE BRAND (NET)	24	29 D	29 D	18
Tops (Tops Market Store Brand)	3	1	6 BD	2
Shop Rite (Shop Rite Store Brand)	2	5 C	-	1
AIPC BRAND (NET)	19	16	18	25
Mueller's (Subnet)	19	16	18	25
Mueller's	19	16	18	25
Mueller's Reduced Carb	0	0	1	0
Other pasta brand	3	1	5	3
Not Specified	3	-	4 B	5 B

Q. 9 Which of the following pasta brands have you purchased most recently?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 5% or more in any column shown except for AIPC brands which are all listed.

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Muellers North: Frequency of Purchasing On Sale or With Coupon

Muellers, Barilla, and San Giorgio are reported to be frequently purchased on sale or with a coupon.

Base: Those Aware of Advertisement	Muellers	Barilla	Light N' Fluffy	Ronzoni	San Giorgio	Store Brand (Net)
	(138)	(157)	(47)*	(59)*	(114)	(133)
	A	C	G	J	K	M
	%	%	%	%	%	%
Frequently	38 G	46 GJ	23	29	42 GJ	46
Occasionally	31	30	32	32	25	24
Sometimes	17	13	30 AC	27 C	22 C	22
Never	14	11	15	12	11	14

Q. 8B For all the brands you have purchased in the past 6 months, please indicate how often you purchase the brand ON SALE OR WITH A COUPON.
Columns tested: A/C/G/J/K/M. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.

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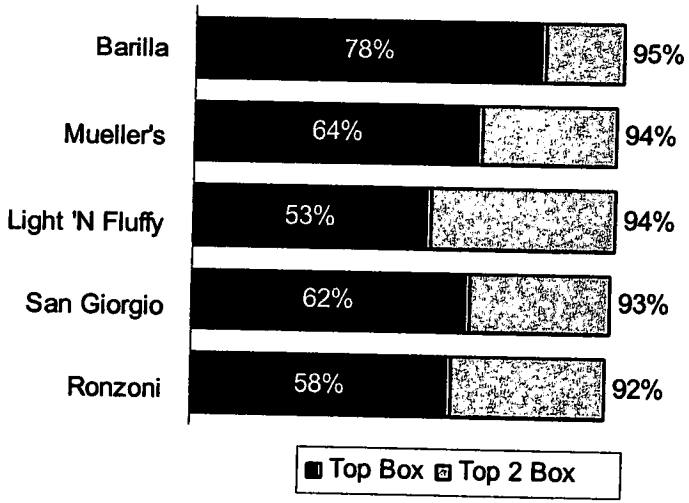
Muellers North: Overall Brand Satisfaction

Muellers users are very satisfied with the brand's performance. Two-thirds of users issue top box (extremely satisfied) ratings to the brand. Virtually all users issue top two box satisfaction ratings.

- However, Barilla generates even stronger top box satisfaction ratings.

Overall Brand Satisfaction



Q. 12 Using the 5-point scale provided, please indicate how satisfied you are with each brand listed.
Base: purchased brand in past 6 months.

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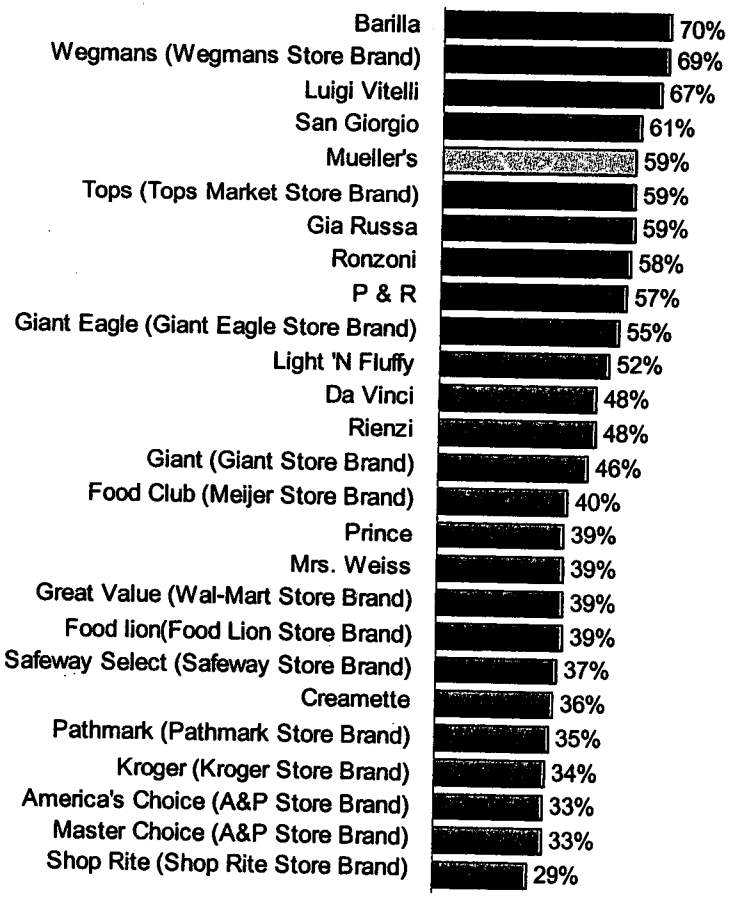
Muellers North: Future Purchase Intent: % Top 2 Box

Among those aware of the respective brands, Barilla, Wegmans private label product and Luigi Vitelli achieve the highest ratings for future purchase intent.

- Muellers also secures a strong score for this measure (though not as high as Barilla), as do San Giorgio, Tops, Gia Russa, and Ronzoni.



Q. 11 Using the scale below, please indicate how likely you are to purchase each of the following brands in the next 6 months.
Base: Aware of given brand.
* Caution: small base size.

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Muellers North: One Pasta Brand Plan to Purchase Next

One-third of consumers say they make their decision regarding the pasta brand to purchase at the store shelf.

- Barilla is most often mentioned as the pasta brand consumers intend to purchase next.
- Heavy category users often mention Barilla, Ronzoni, and Creamette as brands they intend to purchase next whereas light category users often mention Muellers.
- Light category users are especially likely to make their brand decision at the store shelf.

		Category Usage			
	Total Muellers North	Heavy	Medium	Light	Likely to Buy Low Carb Pasta
Base: Total Respondents	(300)	(87)*	(93)*	(109)	(94)*
	A	B	C	D	S
	%	%	%	%	%
Barilla	20	30 CD	16	17	19
NEW WORLD PASTA (NET)	18	21	20	13	19
San Giorgio	8	8	9	7	7
Ronzoni	6	8 D	8	3	6
Creamette	2	5 C	-	2	3
Prince	1	-	4 BD	-	2
Light 'N Fluffy	0	-	-	1	-
AIPC BRAND (NET)	13	9	14	17 B	18
Mueller's (Subnet)	13	9	14	17 B	18
Mueller's	12	9	11	17	14
Mueller's Reduced Carb	1	-	3 B	1	4
STORE BRAND (NET)	12	14	14	9	7
Tops (Tops Market Store Brand)	1	-	3 B	1	1
Other pasta brand	3	1	6 BD	1	4
Doesn't matter, I make my decision at the shelf	32	22	29	39 B	32

Q. 10A Which ONE brand of pasta do you plan to purchase the next time you purchase pasta?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 3% or more in any column shown except for AIPC brands which are all listed.

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Muellers North: Brand Most Preferred

Barilla is the brand most often mentioned as consumers' preferred brand of pasta.

- Mentions of Muellers are roughly half that of Barilla.
- Store brands are named the preferred brand by very few consumers.
- Again, AIPC appears to have its strongest brand base among light category users.

		Category Usage		
	Total Muellers North	Heavy	Medium	Light
Base: Total Respondents	(300)	(87)*	(93)*	(109)
	A	B	C	D
	%	%	%	%
Barilla	35	44 D	40 D	25
NEW WORLD PASTA (NET)	31	32	30	28
San Giorgio	14	11	11	18
Ronzoni	10	13 D	12 D	5
Creamette	3	6 C	1	4
Prince	2	2	4 D	-
AIPC BRAND (NET)	19	9	14	32 BC
Mueller's (Subnet)	19	9	14	32 BC
Mueller's	19	9	13	32 BC
Mueller's Reduced Carb	0	-	1	-
STORE BRAND (NET)	8	8	11	7
Luigi Vitelli	1	3 D	1	-
Other pasta brand	2	-	3 B	2

Q. 10B Of the following brands you have seen or heard of, please indicate which one brand would be your most preferred brand?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 3% or more in any column shown except for AIPC brands which are all listed.

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Muellers North: General Pasta Brand Attitude

- Heavy category users are more likely to be brand loyal, saying that one brand of pasta is the best and they always buy that brand.
  - Unfortunately, as shown earlier, heavy category users tend to purchase Barilla or New World Pasta brands.
  - Still, a small percentage of users overall fall into this category of extreme brand loyalty. Most recognize that some pasta brands are better than others and choose from among an acceptable set of brands.

		Category Usage			
	Total Muellers North	Heavy	Medium	Light	Likely to Buy Low Carb Pasta
Base: Total Respondents	(300)	(87)*	(93)*	(109)	(94)*
	A	B	C	D	S
	%	%	%	%	%
Some pasta brands are better than others and it is important that I buy one of those	55	57	53	55	66
Some brands are better than others, but it's not that important which brand of pasta I buy	25	20	26	28	20
All the pasta brands are about the same, so it doesn't matter to me which one I buy	15	14	18	13	10
One pasta brand is best and it is important to me to always buy that brand	5	9 C	3	5	4

Q. 14B Using the scale below, please indicate how important each of the following statements are to you when considering which brand of pasta to buy.
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Muellers North: Demographic Profile by Brand Users

San Giorgio pasta users have higher annual household incomes. Users of Ronzoni tend to be non-White and have a female head of household who is working full-time.

		Past 6 Months Brand Usage				
	Total Muellers North	Muellers	Barilla	San Giorgio	Ronzoni	Store Brand (Net)
Base - Those Aware of Any Advertisement	(300)	(138)	(157)	(114)	(59)*	(133)
	A	L	M	N	O	P
	%	%	%	%	%	%
Mean Age	40.7	41.0	40.6	41.1	41.6	40.6
Marital Status						
Married	76	76	76	80	73	80
Single (Net)	24	24	24	20	27	20
Never married	15	13	13	16	14	13
Divorced/separated	8	9	10 N	4	14 NP	6
Widowed	1	1	1	-	-	2
Employment of Female Head of Household						
Employed (Net)	79	79	76	82	88 M	80
Full time	67	66	64	68	78 LMP	65
Part time	12	13	12	14	10	14
Not Employed (Net)	18	17	22 O	15	10	17
Retired	1	1	1	1	-	-
Homemaker	15	16 O	18 O	13	7	15
Other	2	1	3	1	3	2
Not specified	3	4	3	3	2	3
Education						
High School Graduate	18	16	19	17	20	18
Some College	24	25	22	22	27	24
College Graduate	38	38	41	41	36	38
Post Graduate	20	20	18	20	17	20
Mean Household Income (in 000s)	82.0	80.3	84.9	87.1 LP	84.7	79
Mean Household Size	3.2	3.4	3.3	3.2	3.2	3.4
Mean Number of Children in Household Under 18	1.8	1.8	1.9	1.8	1.8	1.9
Race of Female Head of Household						
White	83	86	89 O	83	78	89
Non-White (Net)	13	11	9	13	20 LMP	8
Black	8	7	4	8	7	4
Asian/Pacific Islander	1	-	1	1	2	-
Other	5	4	4	4	12 LMNP	5
Not specified	3	4	3	4	2	3

Q. S3: Please indicate your age.
Q. S6: What is the highest level of education you have completed?
Q. S5: Which of the following best describes your total yearly household income?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
Marital status, employment, household size, number of children, and race of female head of household obtained from panel data.

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Muellers North Category Drivers

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Muellers North: Category Drivers

Providing a pasta that offers a Consistent Taste & Texture is very important in the Muellers North sales area.

- Tasting best and having a good texture are most critical. Also very important is being a brand that consumers can rely on for everyday occasions (one of the Inspiration & Versatility attributes).
- Next in terms of importance are two features related to having a Consistent Taste & Texture: being a brand consumers can rely on to provide a nutritious meal, and being a brand consumers can rely on for special occasions.
- Being a low/reduced carb brand is least important.
  - Attributes related to Heritage & Authenticity are of moderate to low importance.
  - Being a good value is of mid-level importance, though being a low priced brand is not.

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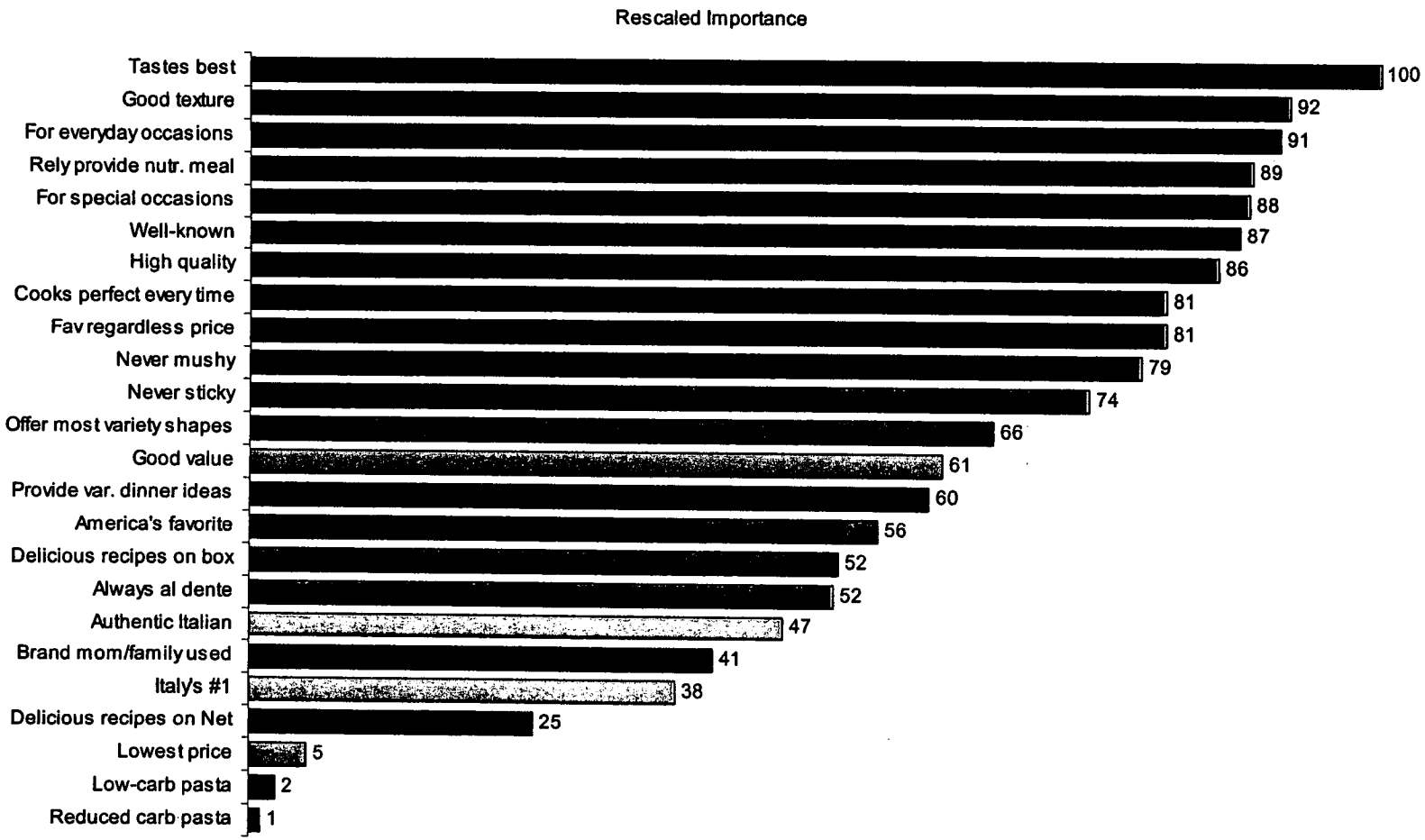
Muellers North: Importance Hierarchy



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Muellers North
Market Structure

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Muellers North: Market Structure

Prince, Creamette, and Light 'N Fluffy are all perceived similarly. San Giorgio, Ronzoni, and Muellers are all aligned with the attributes related to Inspiration & Versatility.

The three store brands – America's Choice, Kroger, and Giant are perceived similarly, though America's Choice and Kroger are most similar. All are perceived as low-price brands.

Barilla has quite a unique brand image, as evidenced by its distance from the center of the map.

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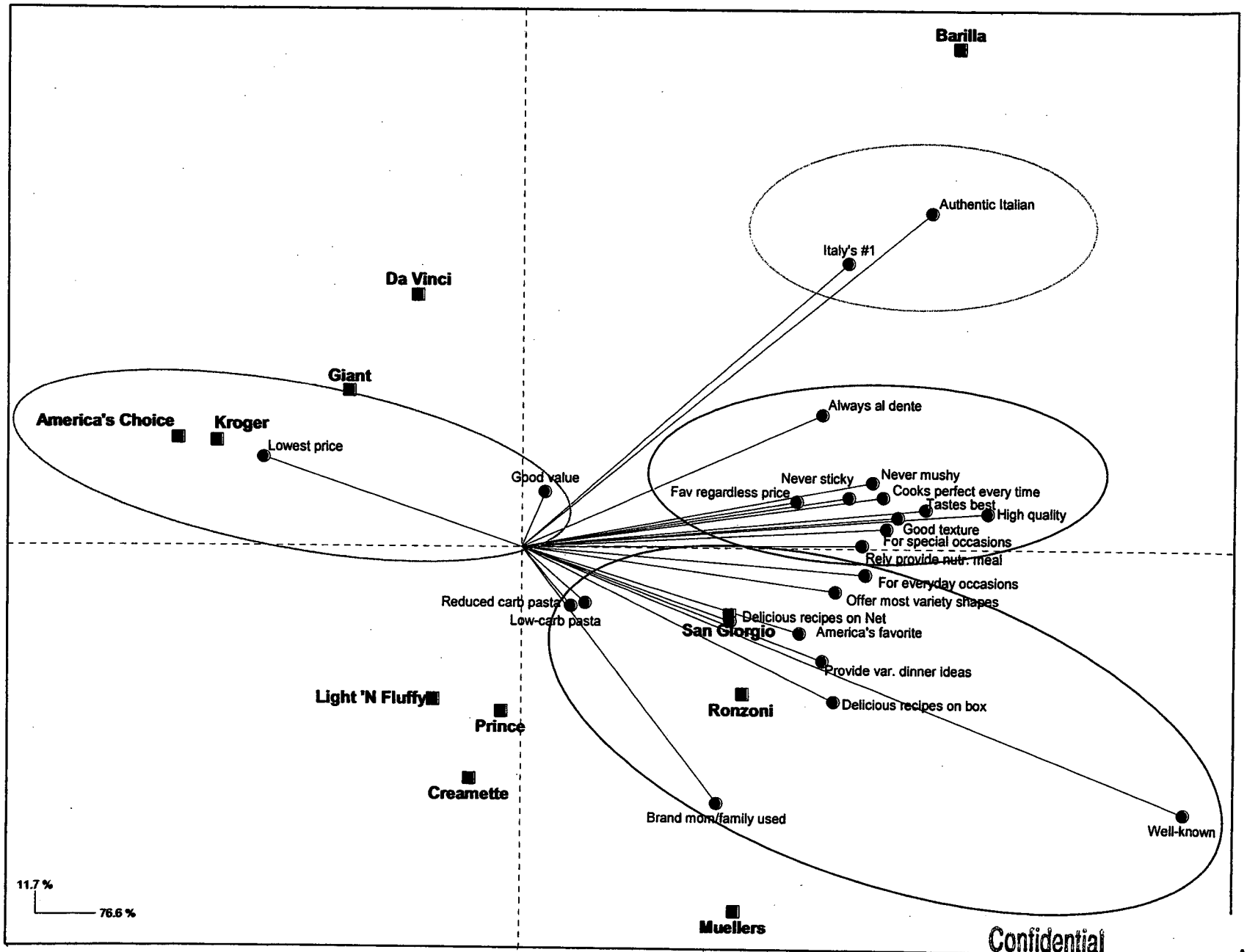
Muellers North: Market Structure



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Muellers North
Brand Image Analysis

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Muellers North: Brand Image Analysis

Unlike in the Total Muellers region, here Muellers and Ronzoni are perceived somewhat differently.

- Both are perceived as brands that mom/family use.
  - Ronzoni is also perceived as America's favorite and as offering pasta in a variety of shapes. However, it is rated poorly for having a good texture and for never being mushy.
  - Muellers is rated higher than Ronzoni for being a well-known brand but is weak for being Authentic Italian pasta (though the latter is only of mid-tier importance to consumers).

Barilla is rated highest for being Italy's #1 pasta, being authentic Italian, and always being Al Dente.

- Da Vinci is also perceived as authentic Italian pasta and, additionally, as a high quality brand. However, it is not rated as highly for being Italy's #1 pasta and it performs poorly for being a well-known brand.

San Giorgio and Prince are rated average on most attributes.

All Store Brands generally offer low prices/good value but are not well-known.

- Of the three Store Brands, Giant is the poorest performer. It has several attributes which are in the 'critical' area in addition to being a well-known brand: tastes best, high quality, and favorite brand regardless of price.

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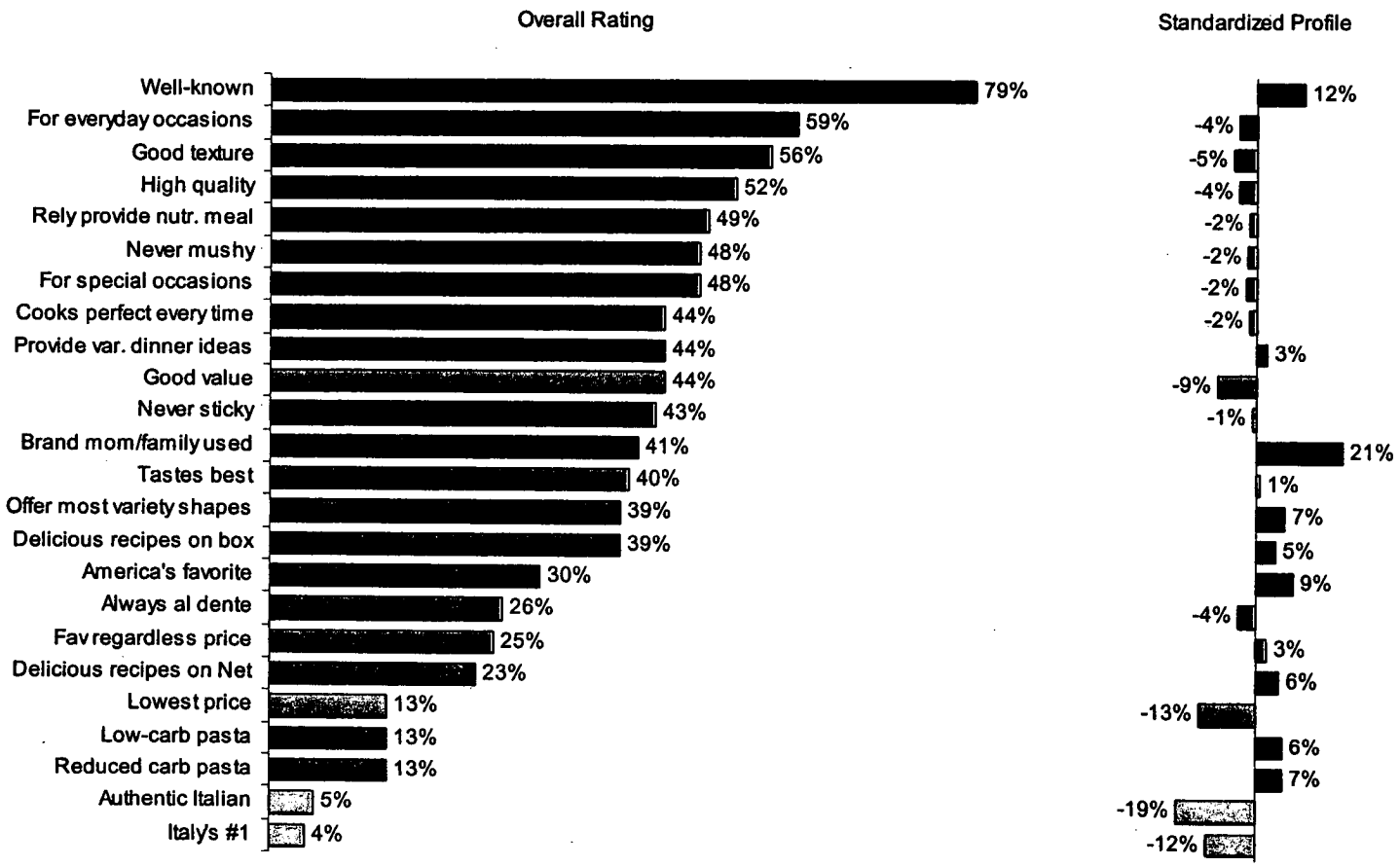
Muellers North: Image Profile – Muellers



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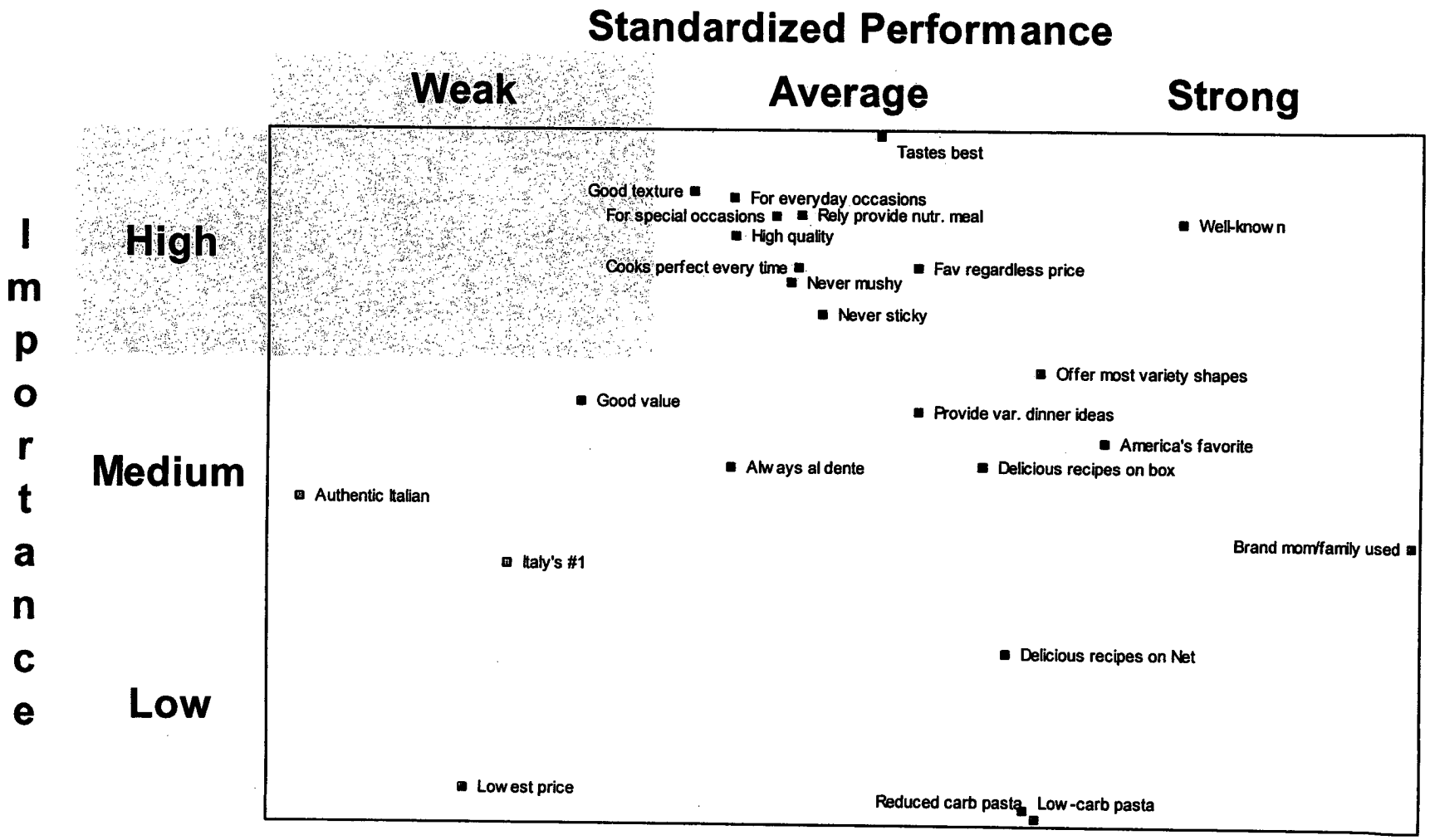
Muellers North: Strategic Matrix – Muellers



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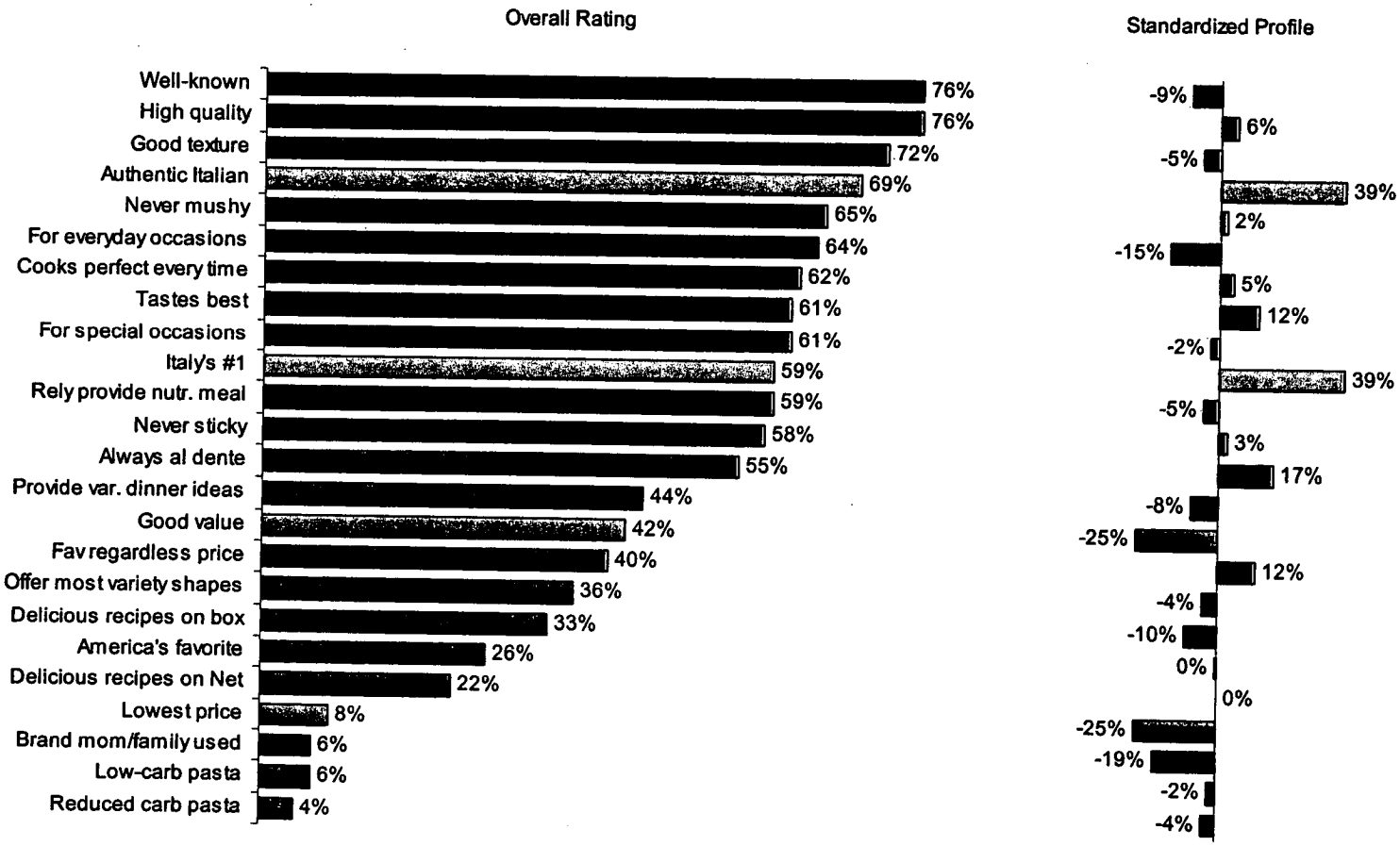
Muellers North: Image Profile – Barilla



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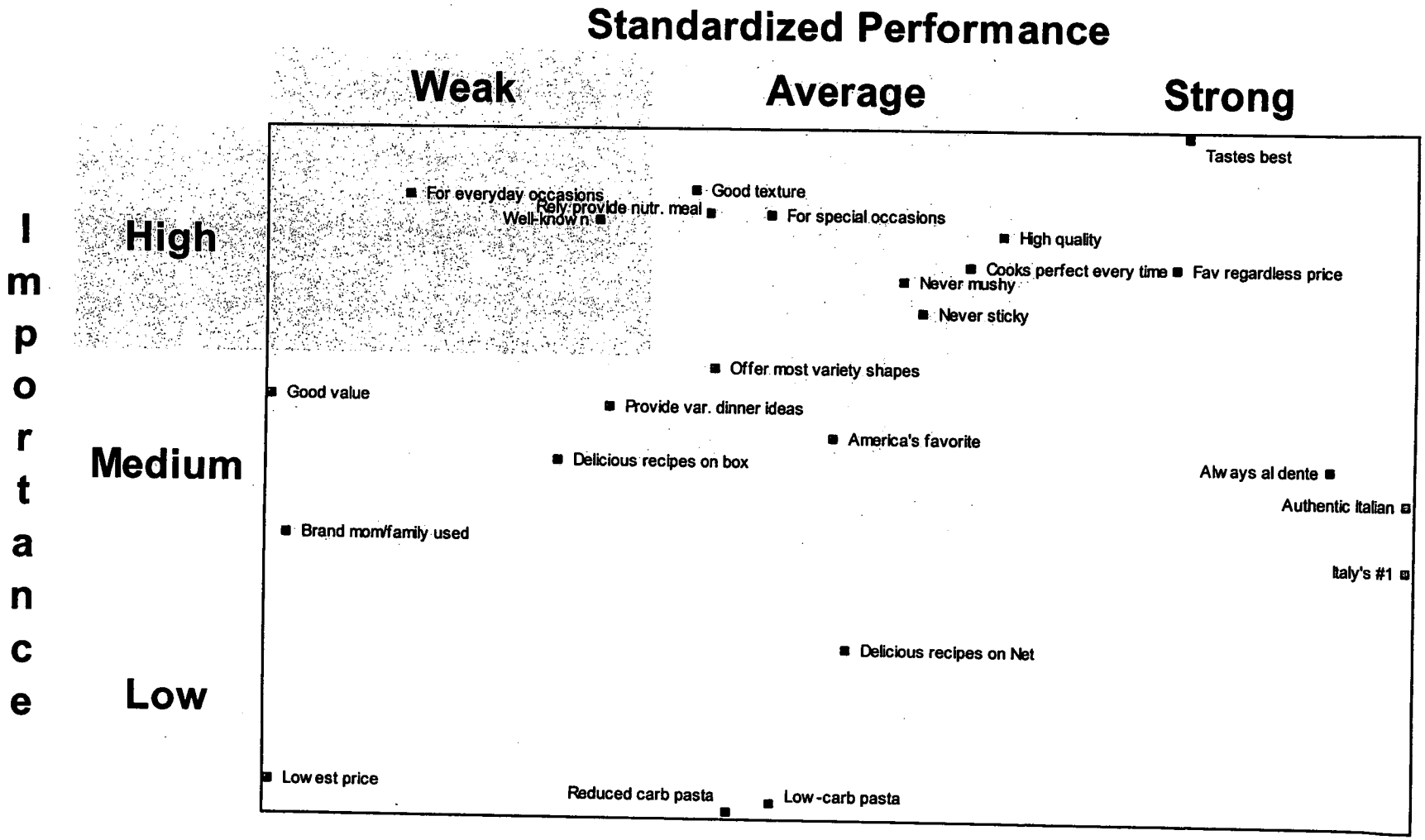
Muellers North: Strategic Matrix – Barilla



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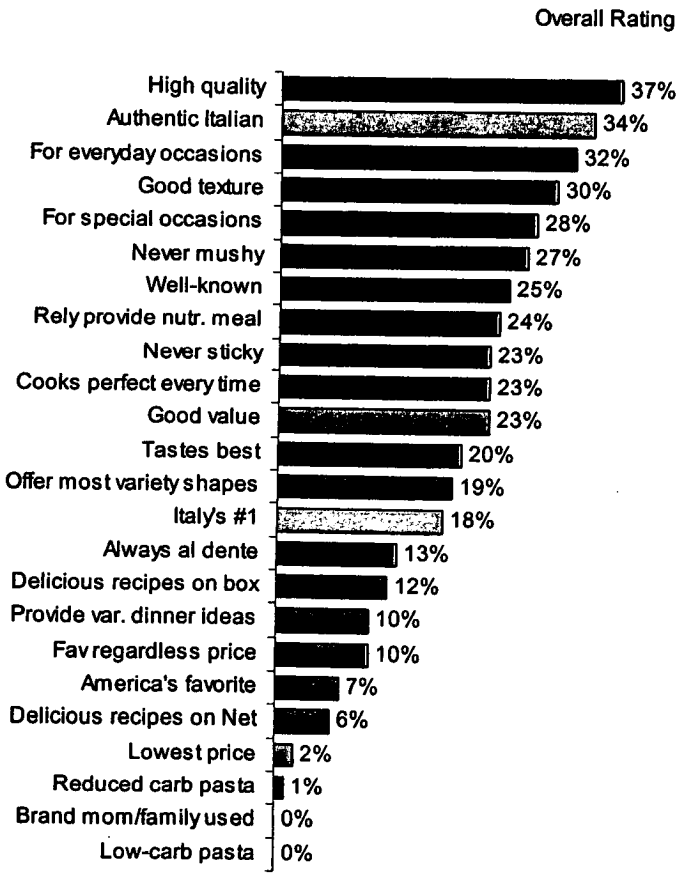
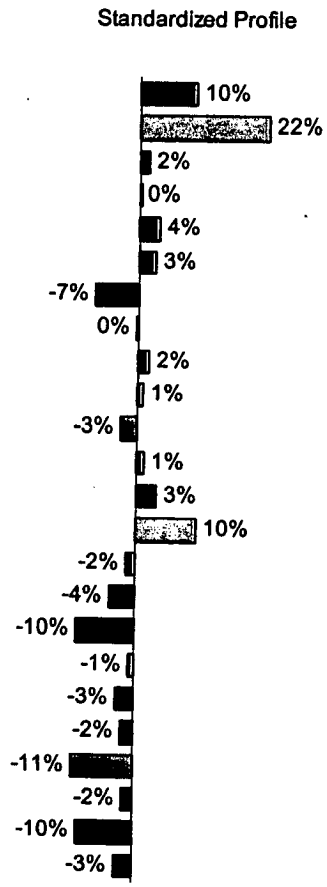
Muellers North: Image Profile – Da Vinci





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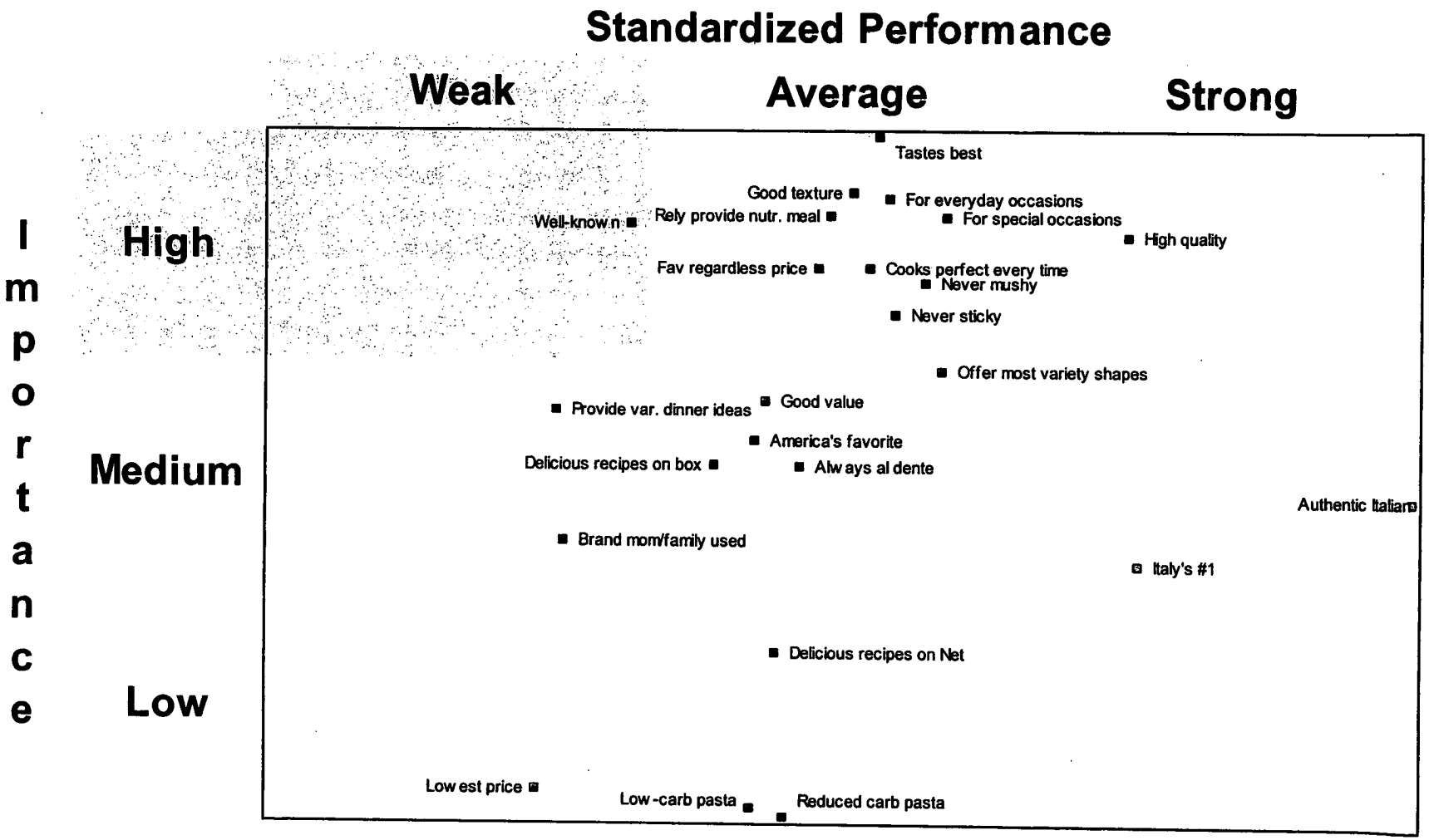
Muellers North: Strategic Matrix – Da Vinci



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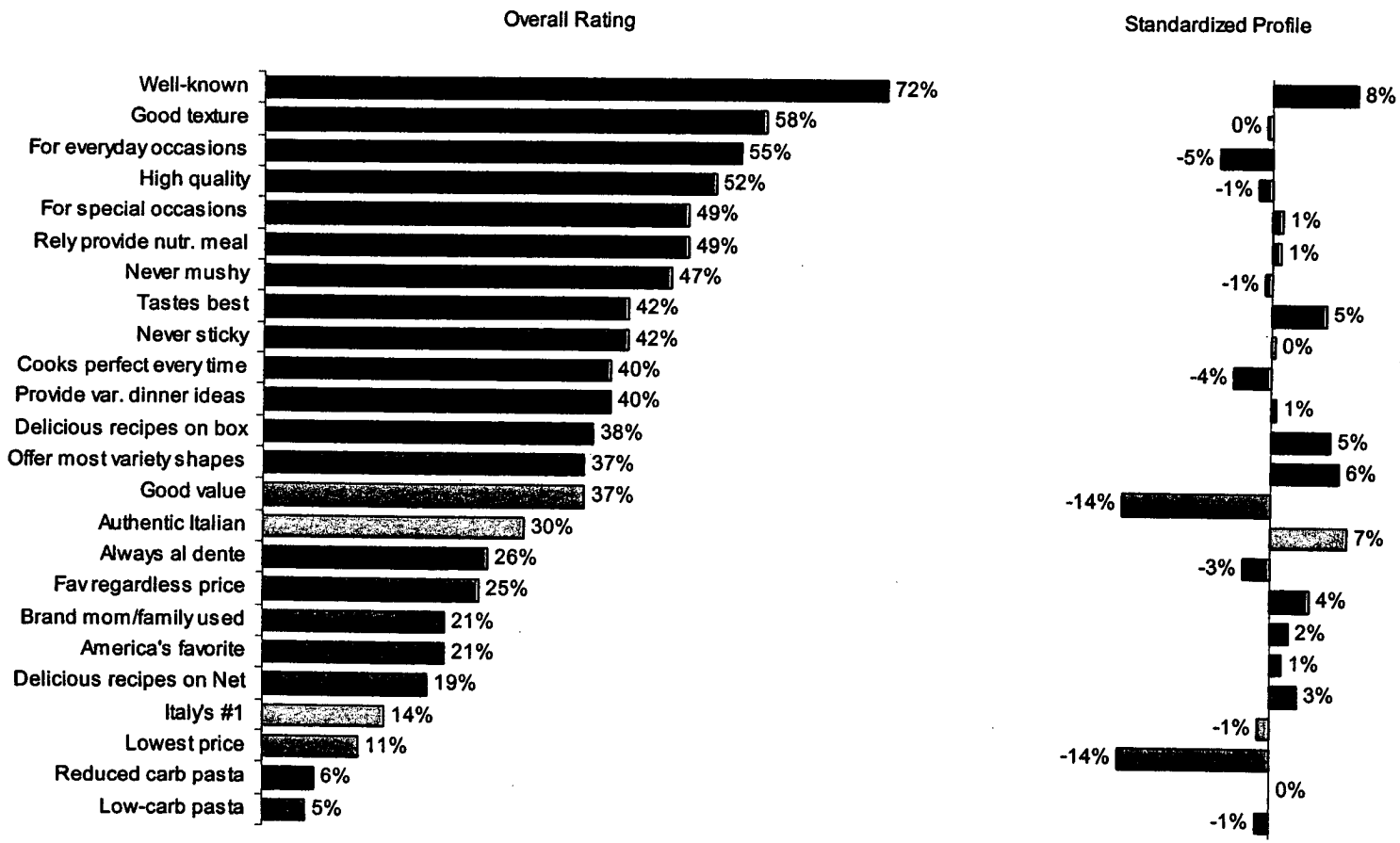
Muellers North: Image Profile – San Giorgio



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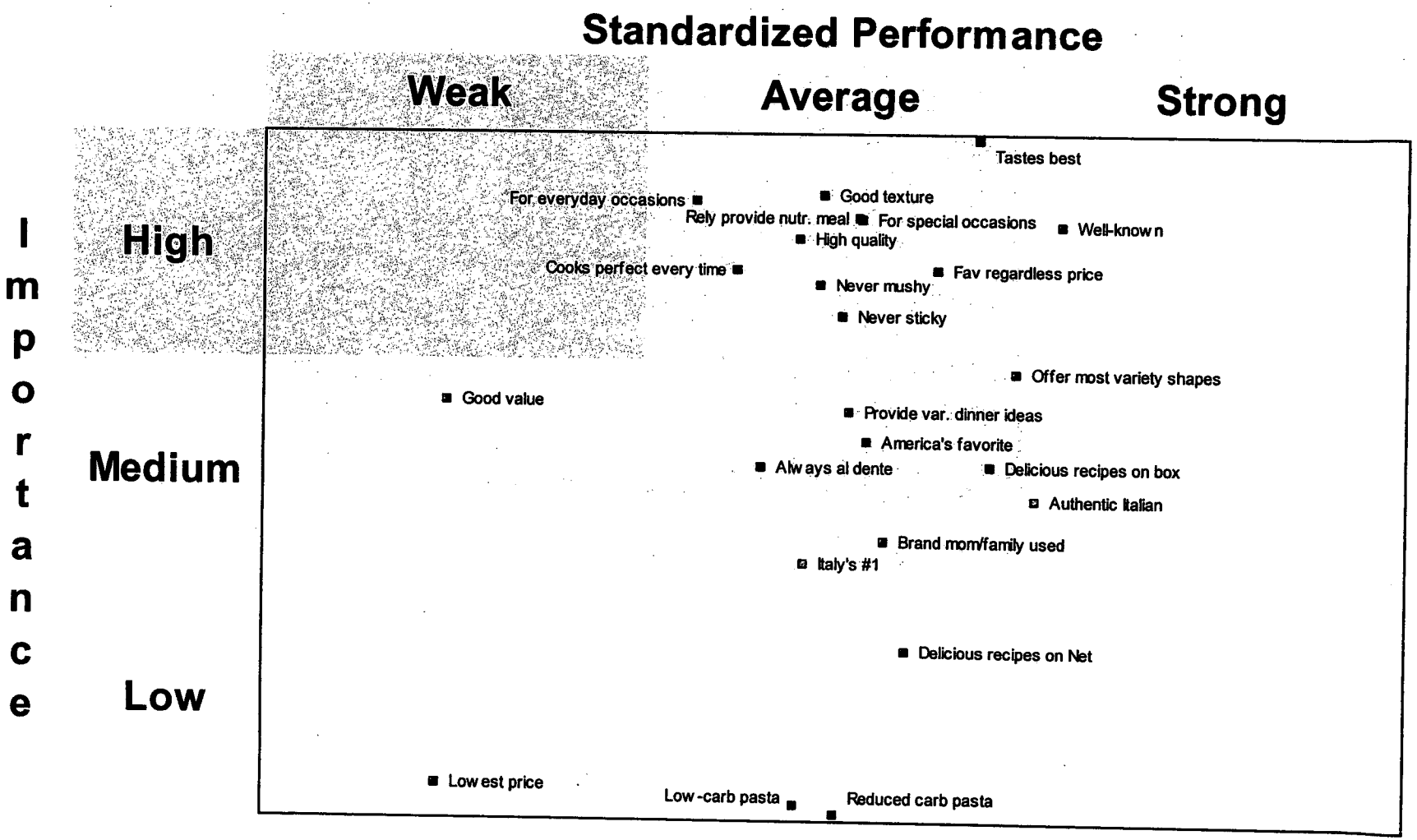
Muellers North: Strategic Matrix – San Giorgio



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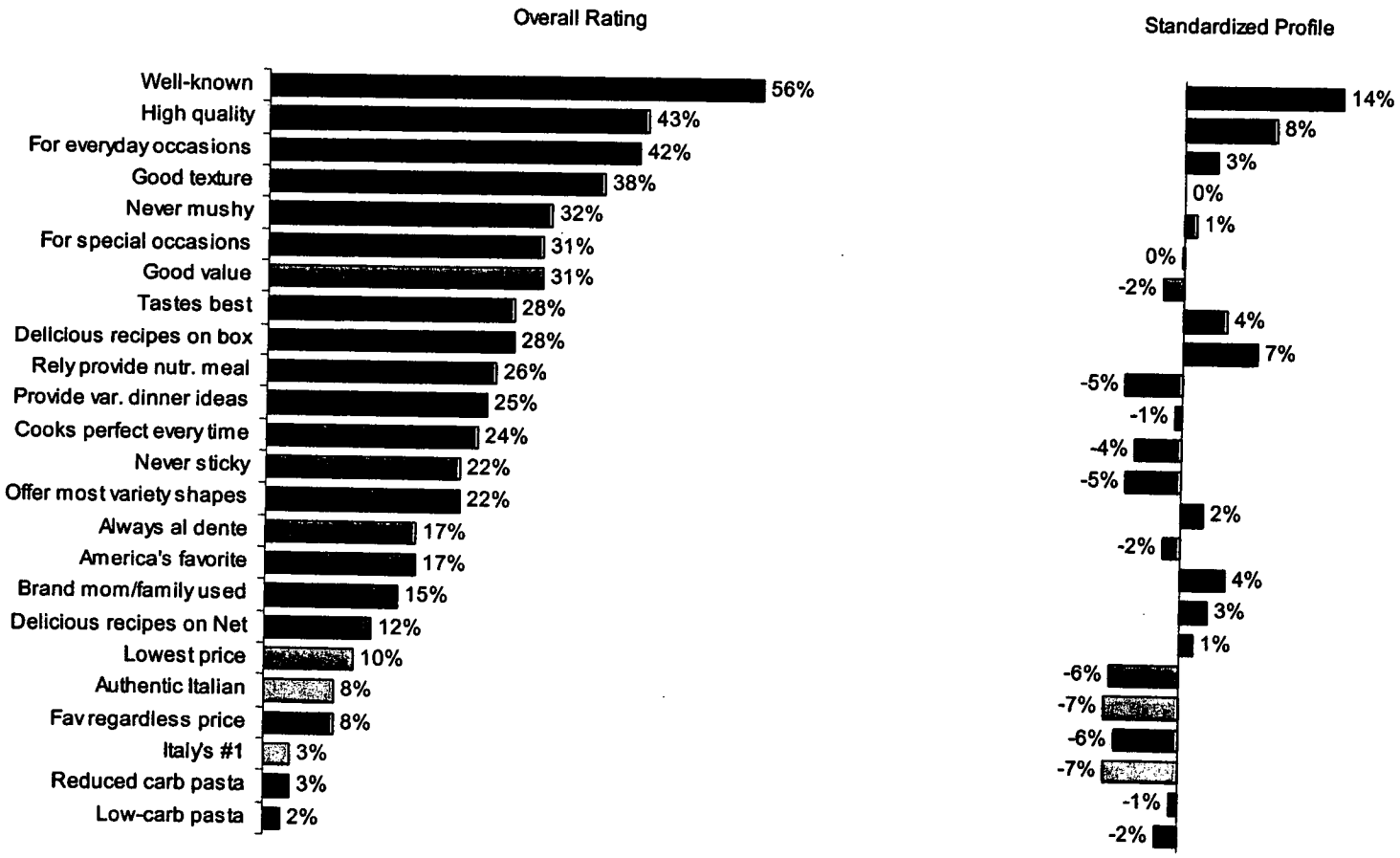
Muellers North: Image Profile – Prince



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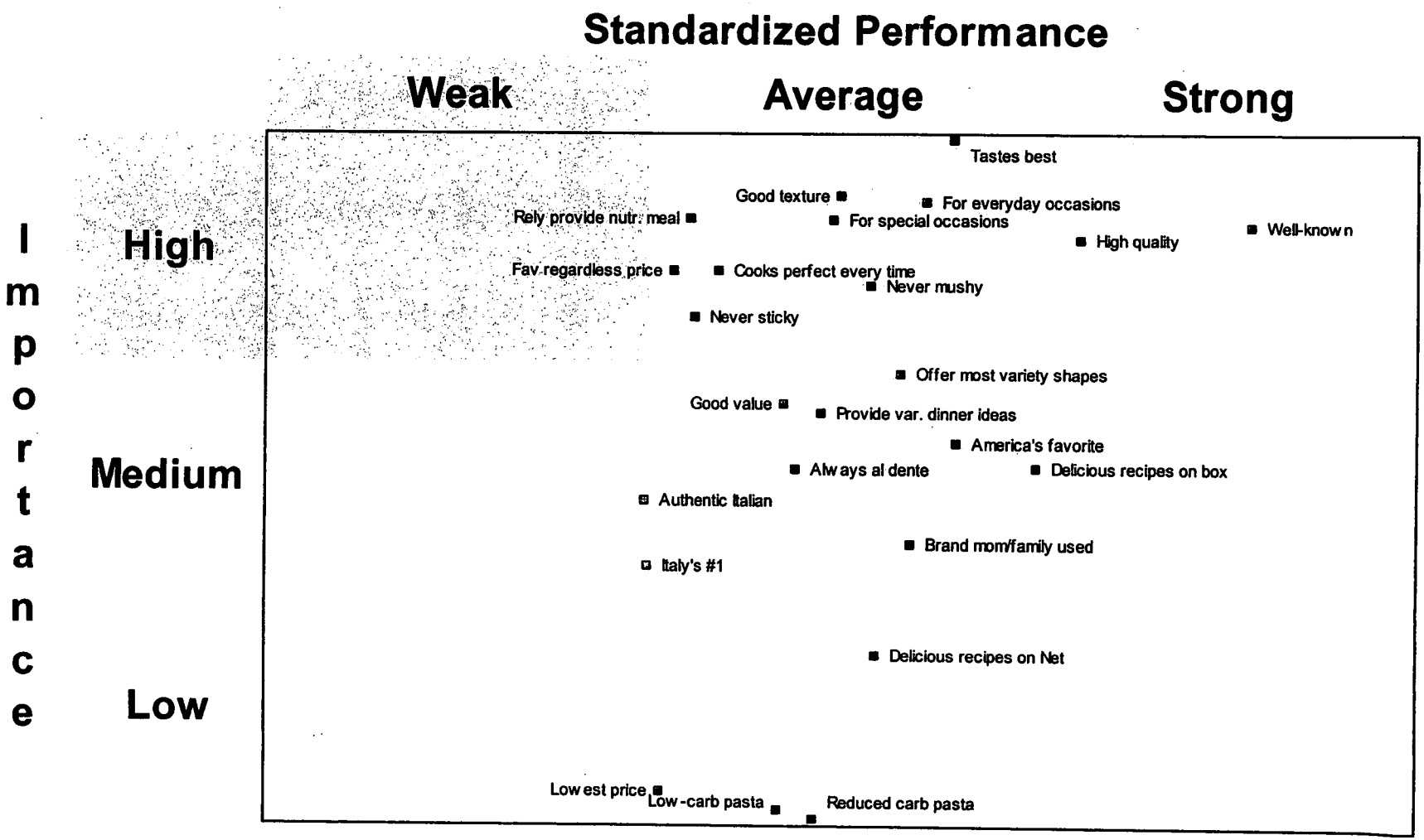
Muellers North: Strategic Matrix – Prince



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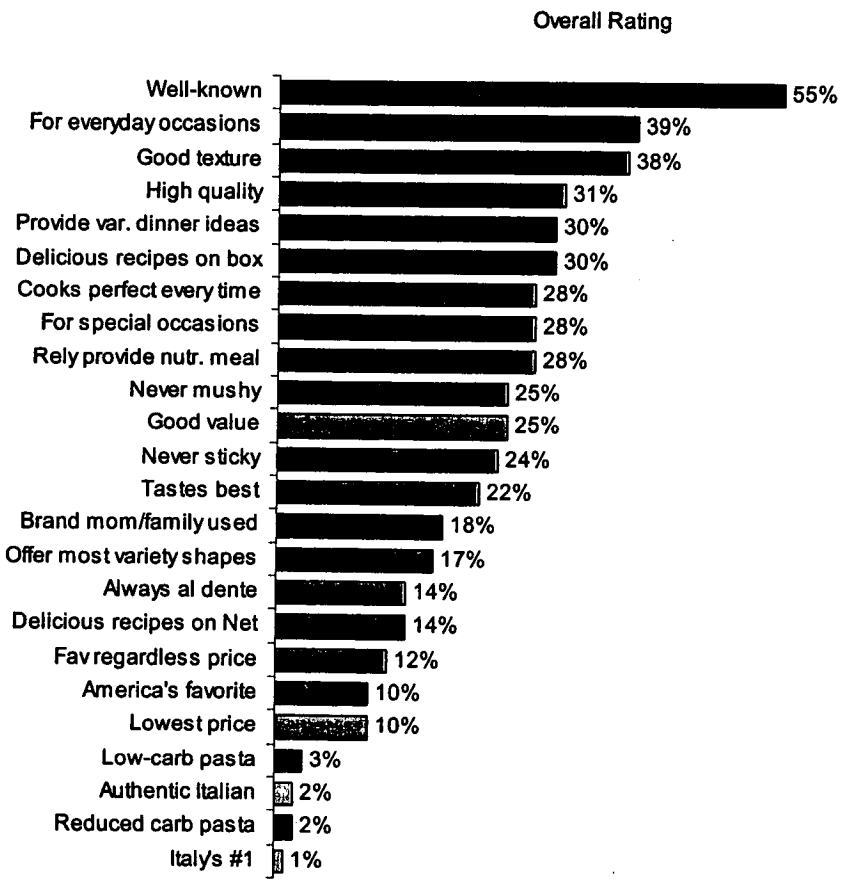
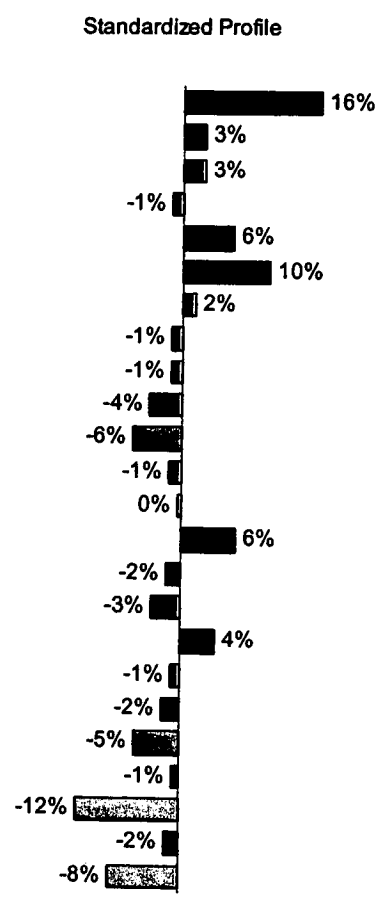
Muellers North: Image Profile – Creamette





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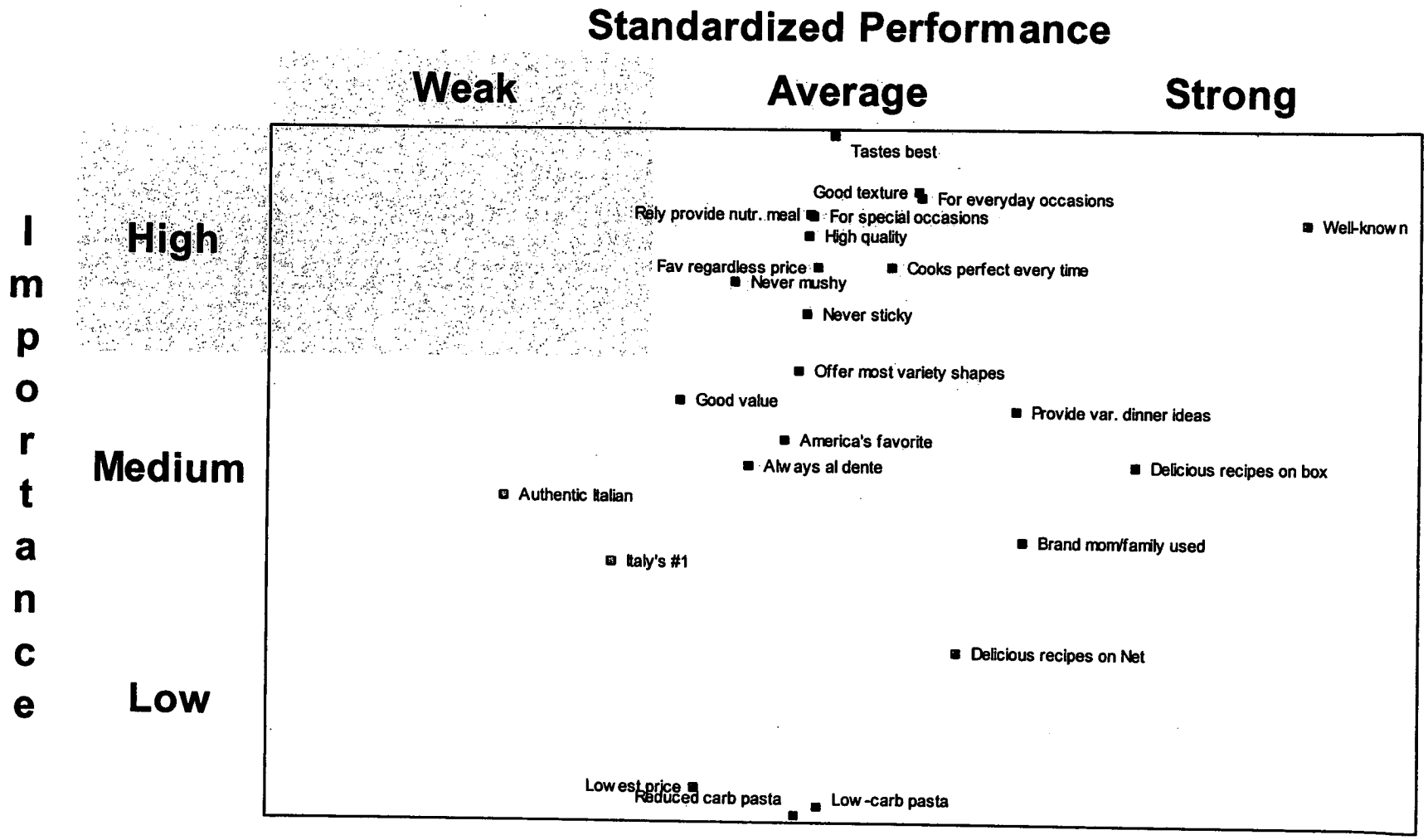
Muellers North: Strategic Matrix – Creamette



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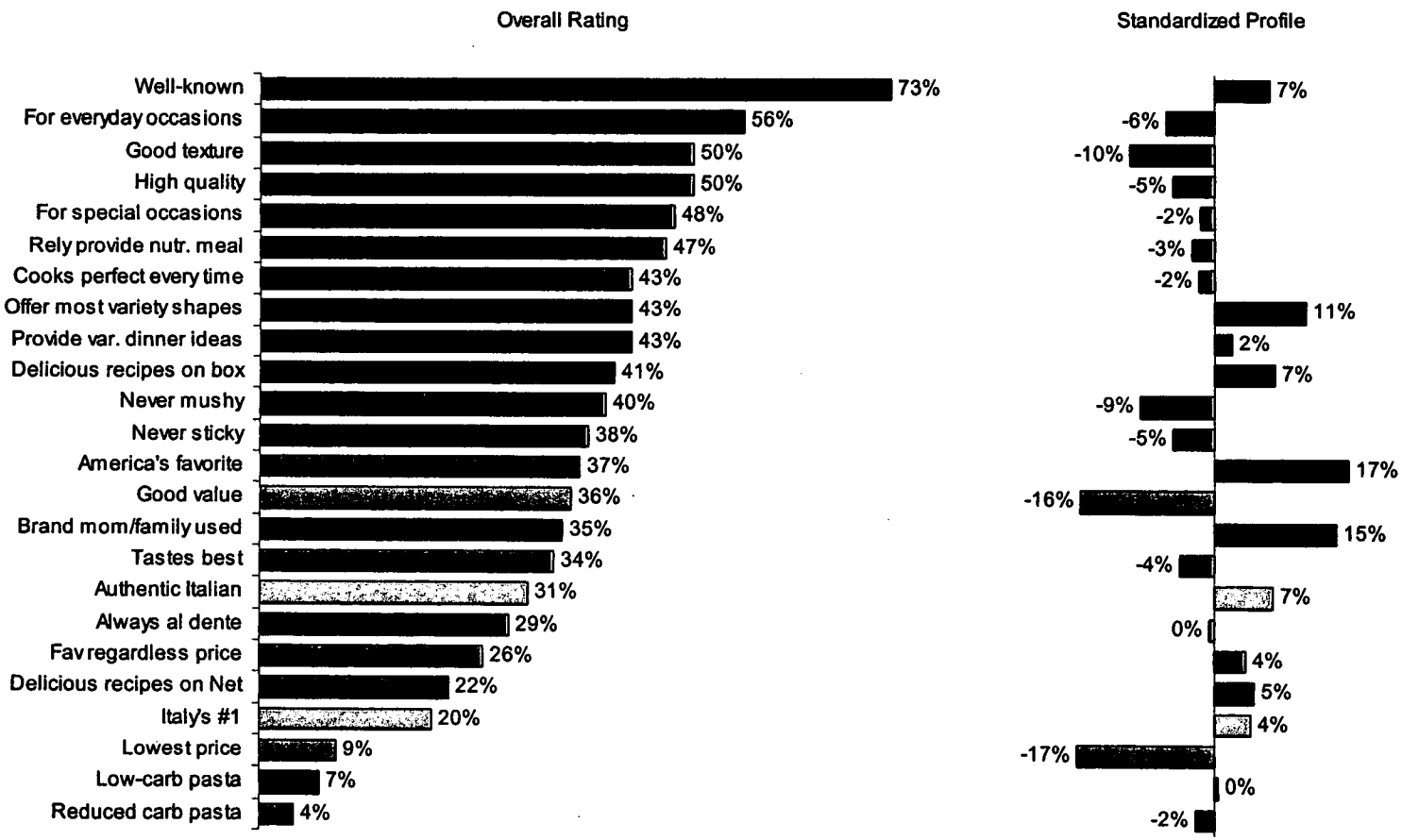
Muellers North: Image Profile – Ronzoni



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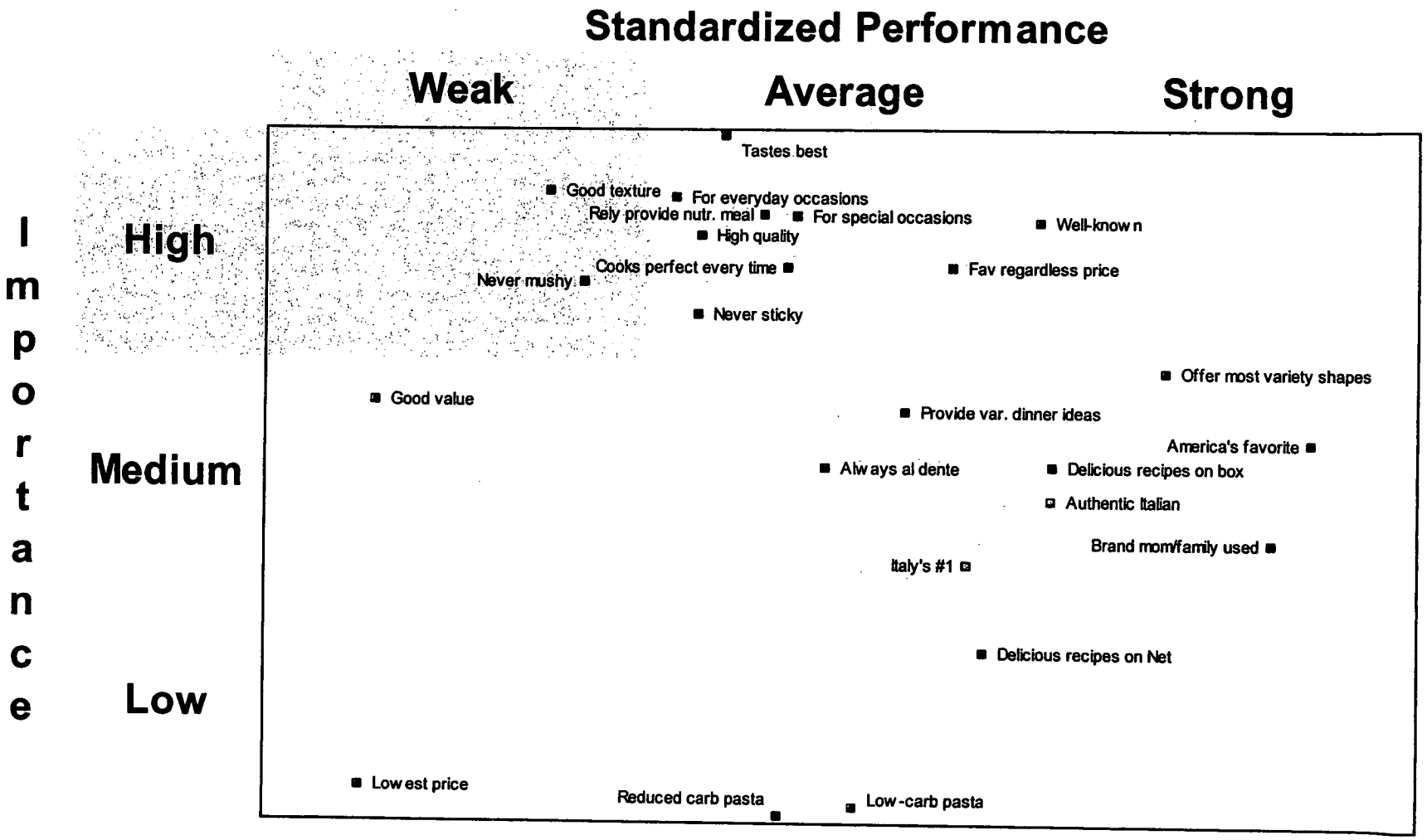
Muellers North: Strategic Matrix – Ronzoni



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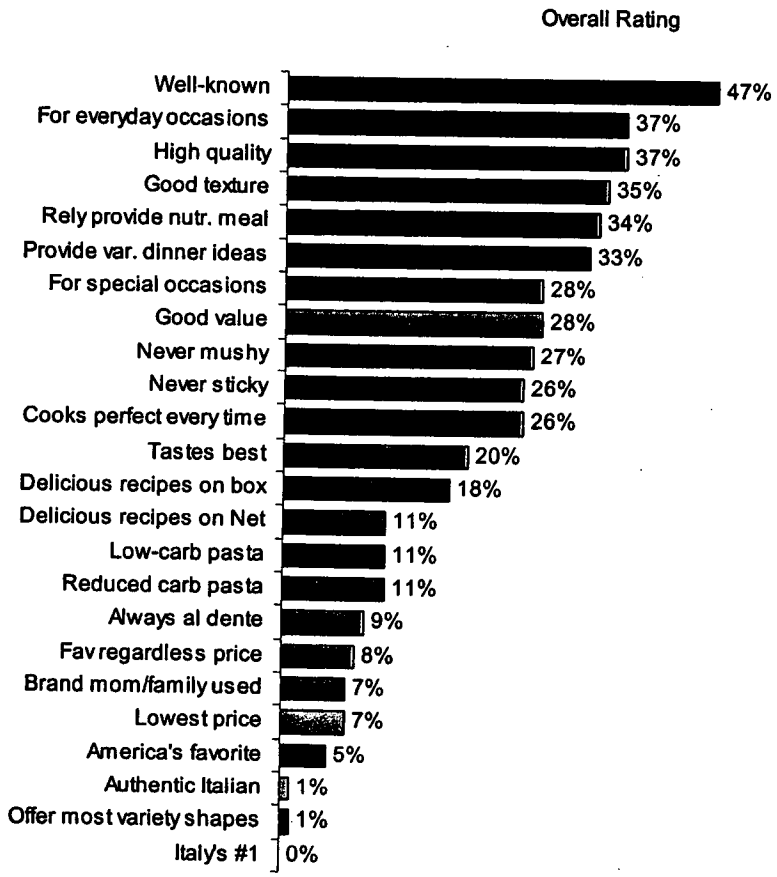
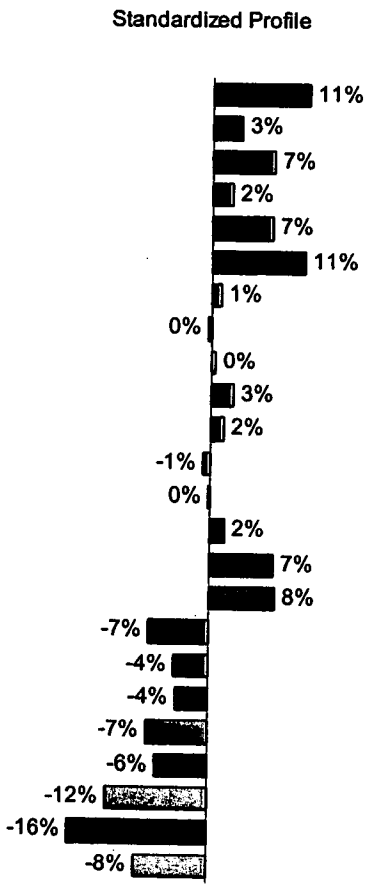
Muellers North: Image Profile – Light 'N Fluffy





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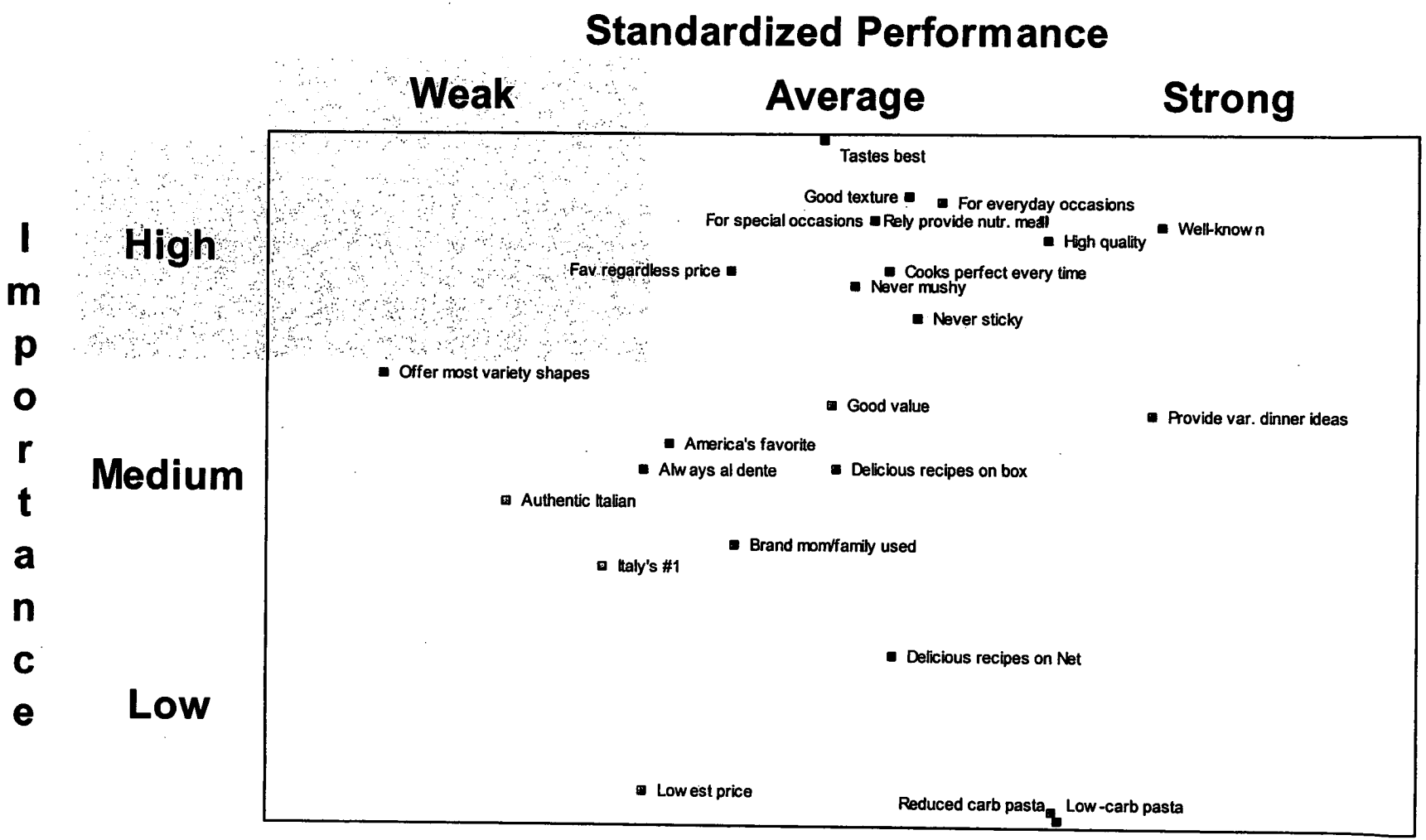
Muellers North: Strategic Matrix – Light 'N Fluffy



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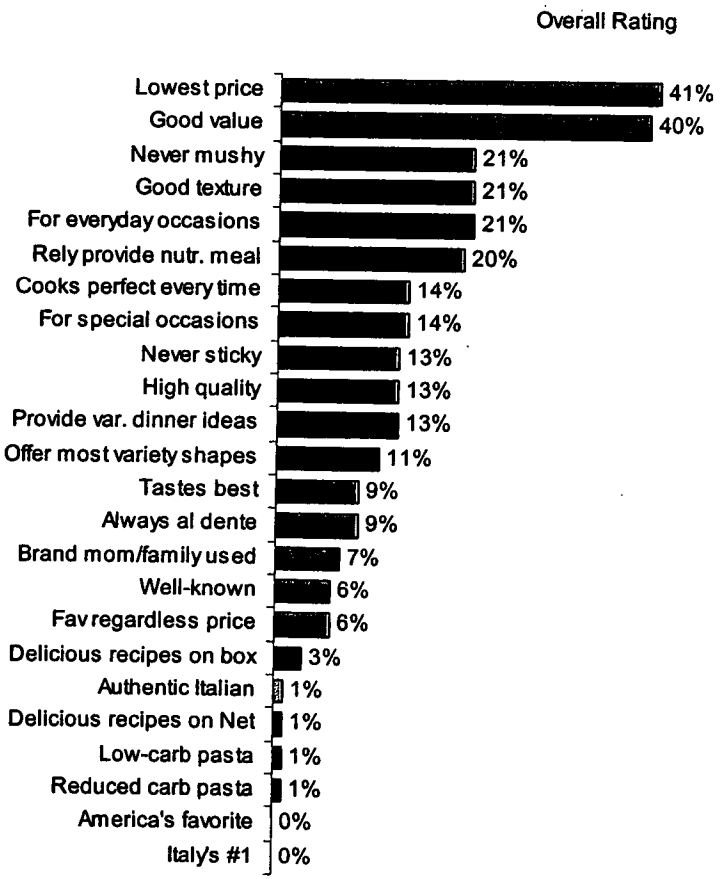
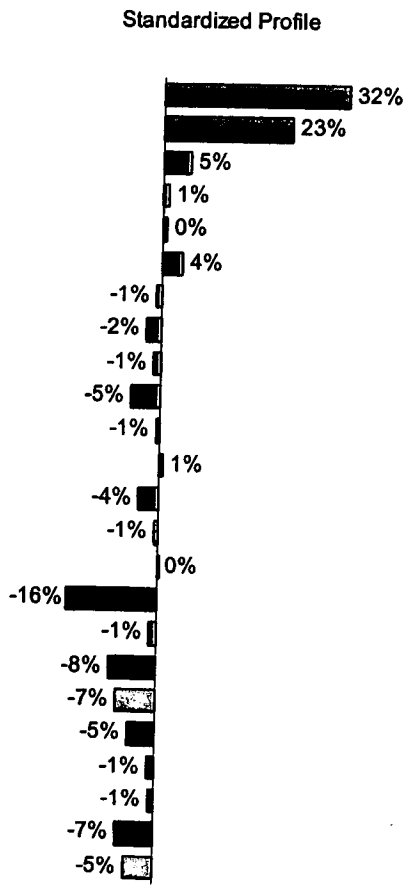
Muellers North: Image Profile – Kroger





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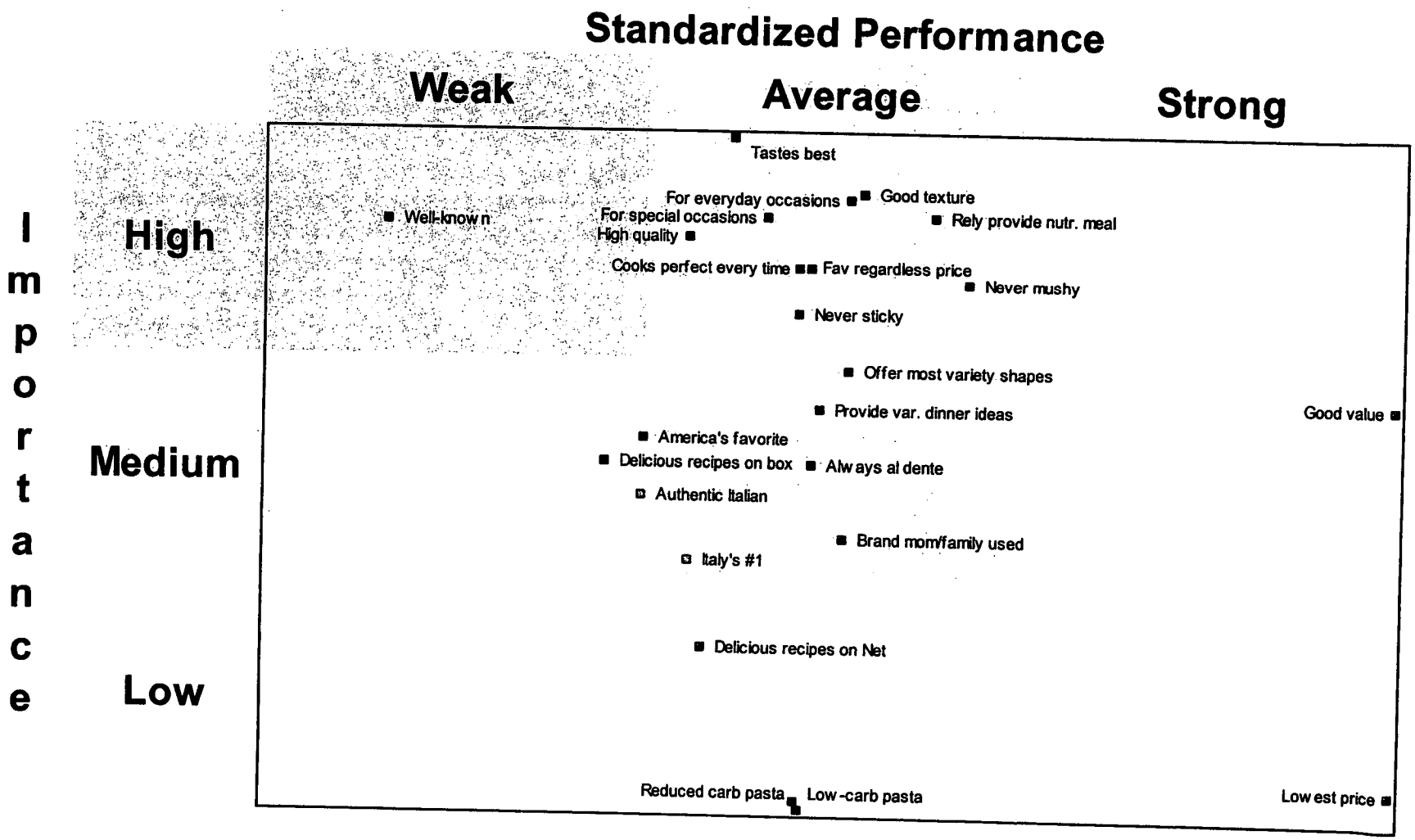
Muellers North: Strategic Matrix – Kroger



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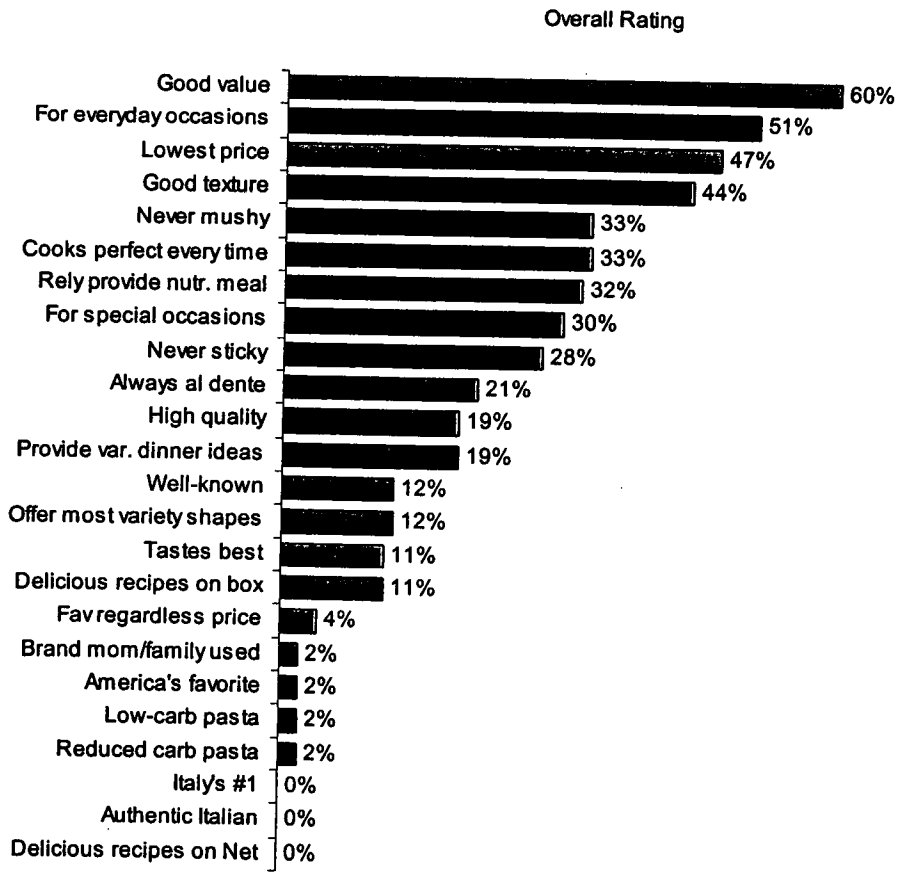
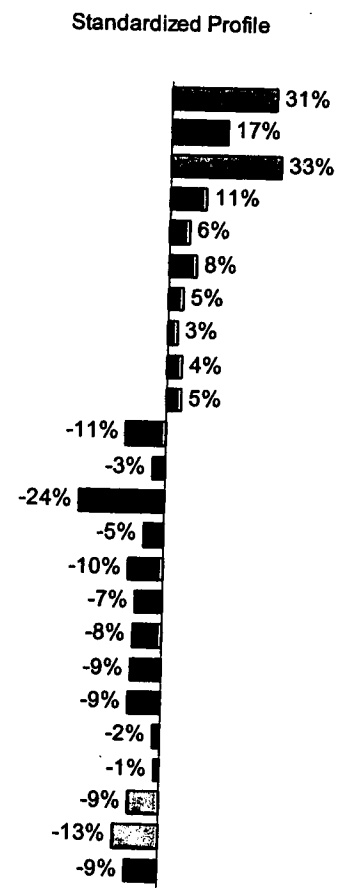
Muellers North: Image Profile – Giant





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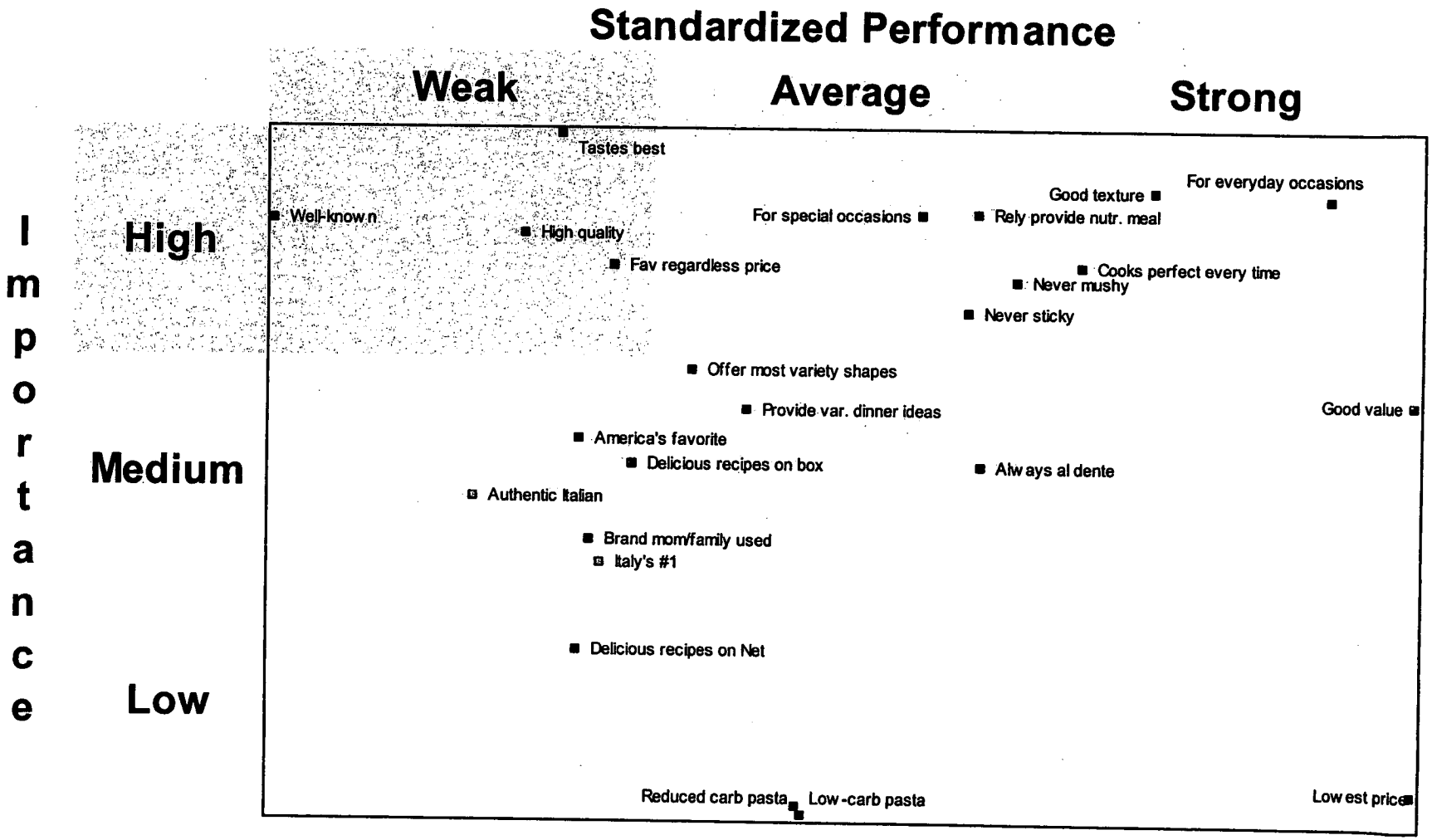
Muellers North: Strategic Matrix – Giant



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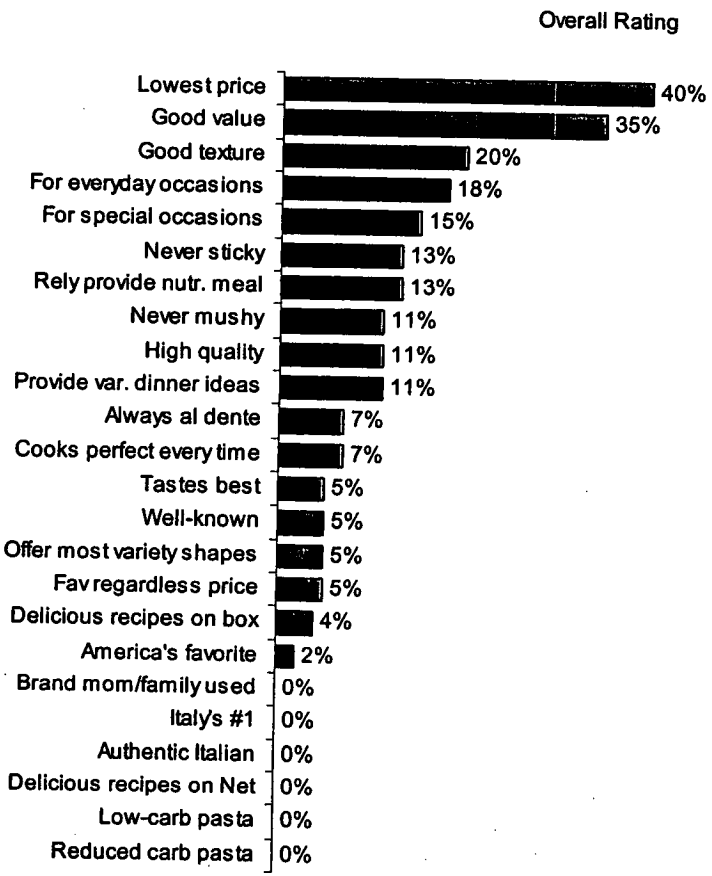
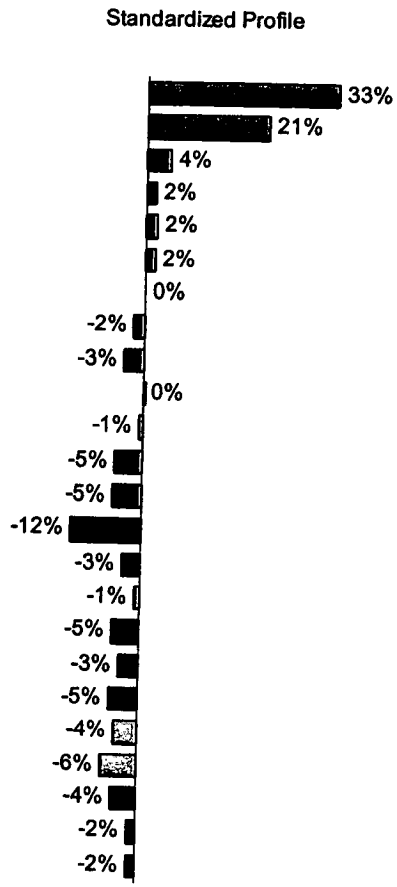
Muellers North: Image Profile – America's Choice





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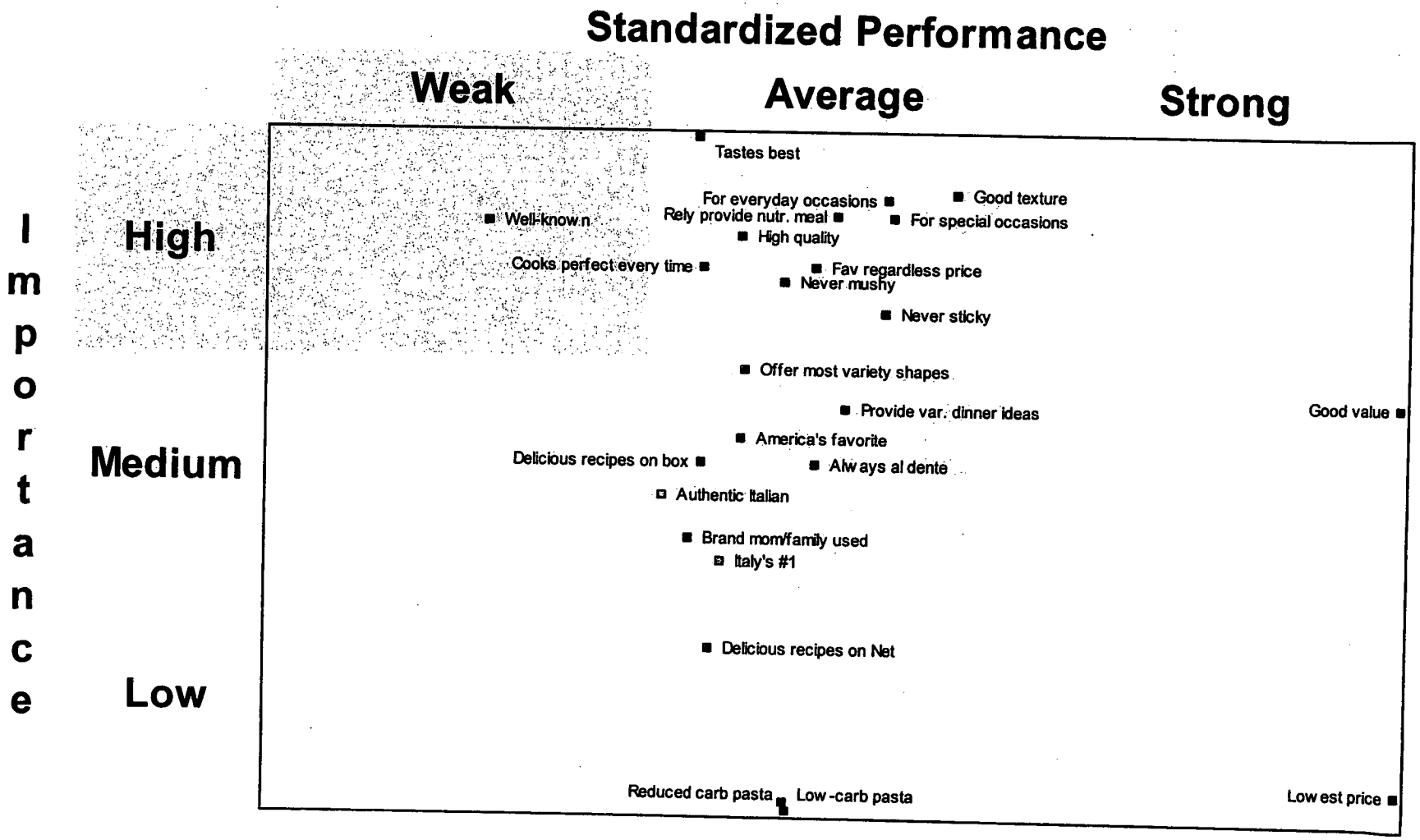
Muellers North: Strategic Matrix – America's Choice



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Synovate®167

Muellers South

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Muellers South: Summary

In the Muellers South region, Muellers is the leading brand of dry packaged pasta.

- Awareness of Muellers is much higher than awareness of Barilla, the New World Pasta brands, and any Store Brand.
- Muellers has highest awareness-to-purchase conversion rate of any brand.
- Cross-brand interactions show that Muellers is a much bigger threat to Barilla than Barilla is to Muellers.
- Muellers is the brand most often named consumers' favorite brand. Mentions of Barilla are far below that of Muellers.

Muellers has a very strong brand image in the market.

- In particular, its strengths are that it is well-known, offers pasta in a variety of shapes, and is a favorite brand regardless of price.
- The brand's performance might be improved if it could change perceptions in a few critical areas: having a good texture, being a brand consumers rely on for everyday occasions, and being a good value.

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Muellers South: Summary

There are a few indications that Muellers should continue to monitor the performance of competitors, particularly Barilla.

- Though Muellers users are quite satisfied with the brand's performance, Barilla users issue even stronger top box satisfaction ratings.
- Consumers recognize Barilla for its advertising efforts and consumers are able to play back some specific ad elements.
  - For Muellers advertising, consumers most often remember price-related messaging (specifically, offering a coupon).
- Though there is some conflicting data regarding the issue, it appears as if Muellers tends to be purchased by light category users whereas Barilla tends to be purchased by heavy category users.

It is important to note that one of Barilla's weaknesses is that it fails to provide consumers with a variety of dinner ideas.

- This may be one area upon which Muellers can capitalize by leveraging its recipe database and makesameal.com.

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Muellers South: Demographic Profile by Category Usage

Within the Muellers South area, heavy category users tend to be older and have more people (including children) in the household.

- The female head of household is especially likely to be White, to have some college education, and to work part-time.

Unlike the Muellers North region, those with higher annual household incomes are no more likely to purchase dry pasta.

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Muellers South: Demographic Profile by Category Usage (continued)

	Muellers South Total	Category Usage: Heavy	Medium	Light
Base: Total Respondents	(300)	(54)*	(86)*	(154)
	A	B	C	D
	%	%	%	%
Mean Age	40.4	42.2 C	39.3	40.2
Marital Status				
Married	74	78	83 D	68
Single (Net)	26	22	17	32 C
Never married	14	7	6	21 BC
Divorced/separated	12	15	10	12
Widowed	0	-	1	-
Employment of Female Head of Household				
Employed (Net)	77	76	76	79
Full time	68	61	66	72
Part time	9	15 D	9	6
Not Employed (Net)	21	24	22	20
Retired	1	-	-	1
Homemaker	18	20	20	16
Other	3	4	2	3
Not specified	2	-	2	1
Education				
High School Graduate	13	11	15	12
Some College	30	39 D	35 D	23
College Graduate	39	30	36	45 B
Post Graduate	18	20	14	20
Mean Household Income (in 000s)	74.6	74.5	71.2	75.2
Mean Household Size	3.0	3.6 D	3.3 D	2.6
Mean Number of Children in Household Under 18	1.7	2.1 CD	1.7	1.6
Race of Female Head of Household				
White	89	96 D	90	86
Non-White (Net)	9	4	8	12 B
Black	7	4	6	10
Asian/Pacific Islander	2	-	2	2
Other	2	-	2	3

Q. S3: Please indicate your age.
Q. S6: What is the highest level of education you have completed?
Q. S5: Which of the following best describes your total yearly household income?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
Marital status, employment, household size, number of children, and race of female head of household obtained from panel data.

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Muellers South
Advertising Awareness and Recall

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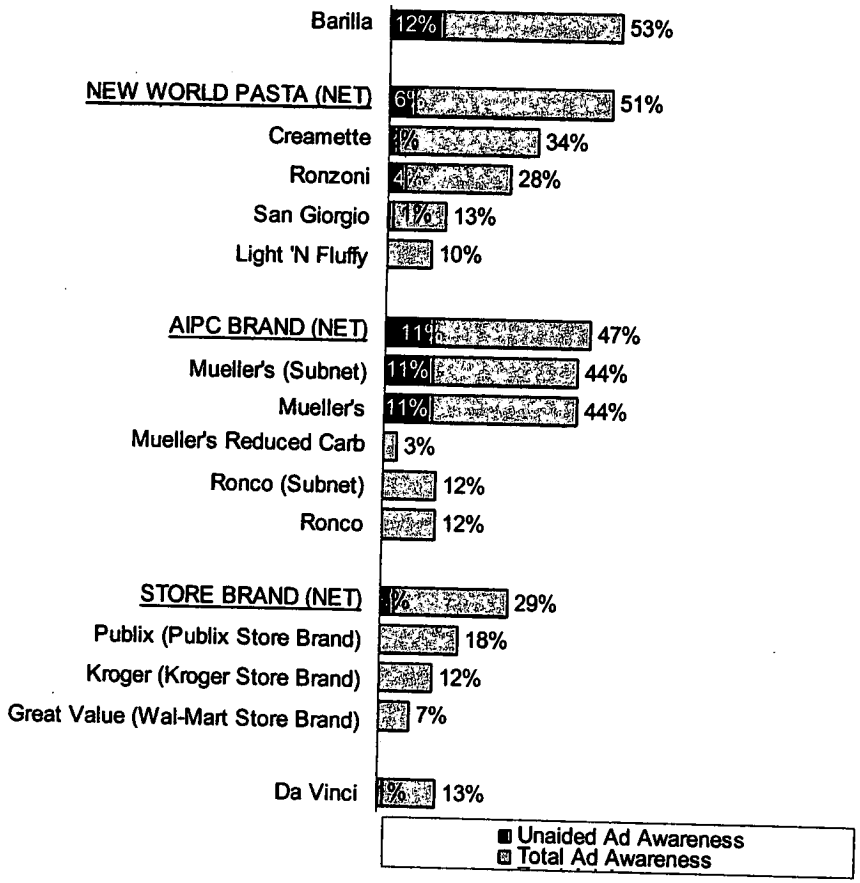
Muellers South: Ad Awareness

Barilla has the highest overall ad recognition.

- Though unaided awareness of Barilla and Muellers is at parity, total awareness of Barilla advertising is higher than that of Muellers.



Q. 2 Which brands of packaged dry pasta have you seen or heard advertised in the PAST MONTH?
Q. 4 You may have already mentioned dry pasta brands you have seen or heard advertised. Using the list below, please indicate ALL dry pasta brands have you EVER HEARD OR SEEN ADVERTISED, including those brands you may have already mentioned.
Only mentions of 7 or more in either column shown except for AIPC brands which are all listed.

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Muellers South: Where Saw Advertisement

The vast majority of consumers who remember seeing an ad for Barilla clearly remember doing so on television.

- Very few consumers name any other source for Barilla ads.

Consumers remember seeing Muellers ads in newspapers and on TV, as well as in magazines.

Base: Those Aware of Advertisement	Muellers (129) A %	Ronco (36)* C %	Barilla (159) E %	Creamette (102) H %	Ronzoni (80)* L %	San Giorgio (39)* M %	Store Brand (Net) (84)* O %	Kroger (36)* P %	Publix (53)* Q %	Da Vinci (37)* R %
Newspaper	36 CEH	8	11	20 E	28 CE	26 CE	45	53 ACE HLM R	38 CEH	27 CE
TV	33 PQ	36 PQ	67 AC HLM PQR	29 PQ	44 HPQ R	36 PQ	15	6	13	19 P
Magazine	26 EPQ	25 PQ	14 PQ	34 ELP QR	21 PQ	23 PQ	4	-	4	16 PQ
Friend/relative/business associate	7 M	-	4	4	4	-	6	6	8 CM	5
Radio	2	-	11 AC HLP Q	1	-	3	1	-	2	3
Saw it in store	2	6 E	1	1	3	3	19	17 AEH LMR	13 AEH LMR	-
Internet	1	-	1	1	-	-	-	-	-	3
Coupons	1	-	1	1	-	-	2	-	2	3
Not sure	14	31 AEL	11	18	15	21	29	25 E	25 AE	27 AE

Q. 5A For each brand you have heard or seen advertised, please indicate where you saw or heard the advertising for each brand.
Q. 5B What other place did you see or hear [INSERT BRAND] advertised?
Columns tested: A/C/E/H/L/M/O/P/Q/R. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.
Only mentions of 3% or more in any column shown.

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Muellers South: Ad Recall and Communication

When asked about Muellers advertising, consumers most often remember price-related messaging (specifically, offering a coupon).

Roughly one in ten consumers who remember seeing a Barilla ad play back the fact that it features authentic Italian pasta and slightly less than one in ten mention the phrase 'Al Dente'.

Ads for store brands generally are price-related ads.

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Muellers South: Ad Recall and Communication (continued)

Base: Those Aware of Advertisement	Muellers	Ronco	Barilla	Creamette	Ronzoni	San Giorgio	Store Brand (Net)	Kroger	Publix	Da Vinci
	(129)	(36)*	(159)	(102)	(80)*	(39)*	(84)*	(36)*	(53)*	(37)*
	%	%	%	%	%	%	%	%	%	%
AD RECALL (NET)	12	8	25	10	11	26	32	19	28	19
TV/Television commercials	2	6	6	3	3	13	4	-	2	3
Seeing it in store	3	3	1	4	1	8	16	17	15	5
All other ad recall mentions	5	-	6	2	1	3	1	-	2	8
BRAND (NET)	8	6	10	7	9	13	1	-	2	5
Barilla name/brand name	4	3	10	6	3	10	-	-	-	5
PACKAGING (NET)	4	3	3	7	8	3	4	-	4	3
PASTA (NET)	5	6	17	8	6	10	-	-	-	3
Authentic/Italian pasta	-	3	11	-	1	3	-	-	-	3
All other pasta mentions	5	3	3	4	3	8	-	-	-	-
PRICE/COST (NET)	24	3	7	17	13	13	47	42	32	8
Low price	2	-	-	3	1	-	15	8	9	-
On sale	5	3	1	3	-	3	18	19	11	-
Coupon	12	-	5	8	8	10	3	-	2	5
All other price/cost mentions	-	-	-	1	-	-	6	8	-	3
PRODUCT ATTRIBUTES (NET)	5	-	4	4	5	3	-	-	-	-
All other product attributes mentions	5	-	2	4	5	3	-	-	-	-
MISCELLANEOUS (NET)	16	3	19	13	6	5	-	8	6	8
Al Dente	-	-	8	-	-	-	-	-	-	3
Recipes (unsp)	7	-	-	4	-	-	-	-	-	-
Family/family oriented	3	-	4	3	1	-	-	-	4	3
Comparable to a name brand	-	3	-	1	-	-	-	-	-	-
Miscellaneous store mentions	-	-	-	-	-	-	-	8	-	-
Don't Know	20	44	15	21	23	26	19	19	9	32
None/nothing	16	25	11	18	20	10	24	14	21	22

Q. 5C What SPECIFICALLY do you recall seeing or hearing about the pasta advertising for [INSERT BRAND]?
* Caution: small base size.
Brands not listed have base sizes too small to analyze.
Stat testing not appropriate on open-ended questions
Only mentions of 7% or more in any column shown.

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Muellers South: Recognition of AIPC Brands' Advertising

Recall of the AIPC ad (based on the description that it features a family eating a pasta meal and gives quick and easy pasta meal ideas) is higher in the Muellers South region than in Muellers North territory:

- 41% of consumers in the South territory claim to remember the ad based on the description (vs. 34% in Muellers North).
- Twice as many consumers (14%) name Muellers as the sponsor of the ad (vs. 6% for Muellers North).
  - Though 14% is still quite low for brand association, unlike in the North, consumers do not overwhelmingly credit Barilla with the ad.
- Three in ten consumers are aware of the "Muellers makes the meal, you make the difference" tagline in the South (vs. two in ten in the North).

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Muellers South: Recognition of AIPC Brands' Advertising (continued)

	Total Muellers South	Past 6 Months Brand Usage				
		Muellers	Barilla	Creamette	Ronzoni	Store Brand (net)
	A	L	M	N	O	P
	%	%	%	%	%	%
Whether Remember AIPC Ad Based on Description						
Base - Those Aware of Any Advertisement	(218)	(135)	(95)*	(38)*	(45)*	(135)
Yes	41	40	45	37	36	41
No	59	60	55	63	64	59
Brand Associated With Advertisement						
Base - Those Aware of Any Advertisement and Recall AIPC Ad	(90)*	(54)*	(43)*	(14)**	(16)**	(56)*
AIPC BRAND (NET)	17	20	19			14
Mueller's (Subnet)	14	20	16			13
Mueller's	14	20	16			13
Ronco (Subnet)	2	-	2			2
Ronco	2	-	2			2
Barilla	16	17	12			16
NEW WORLD PASTA (NET)	13	9	14			13
Ronzoni	6	7	7			5
Creamette	3	-	5			2
Kraft	3	4	5			2
STORE BRAND (NET)	3	6	7			5
Publix (Publix Store Brand)	3	6	7			5
Don't Know/Remember	36	33	30			39
Aided Awareness of Mueller's Slogan						
Base - Those Aware of Mueller's Advertisement	(129)	(95)*	(57)*	(25)**	(31)*	(81)*
Yes	33	29	33		32	35
No	67	71	67		68	65

Q. 6A Do you remember seeing a pasta advertisement featuring a family eating a pasta meal or one that gives quick and easy pasta meal ideas?
Q. 6B What brand of pasta was being advertised?
Q. 6C Have you heard of the phrase [INSERT AIPC BRAND] MAKES THE MEAL, YOU MAKE THE DIFFERENCE in a pasta advertisement?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
** Base size too small to analyze.
Only mentions of 5% or more in any column shown (for Q. 6B).
Stats testing not appropriate on open-ended questions (Q. 6B).

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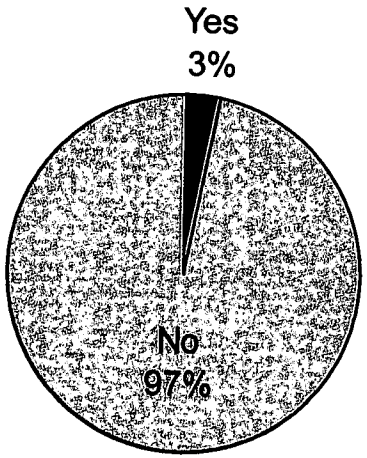
Muellers South: Aided Awareness of AIPC Website

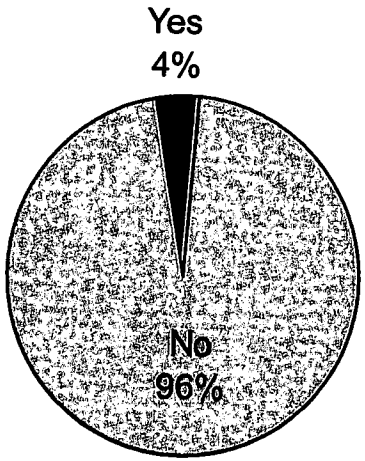
Despite Muellers' strong brand and advertising awareness scores, very few consumers are aware of www.makesameal.com.

Whether Heard About or Visited Makesameal.com

Total Muellers South



Past 6 Months Muellers Users



Q. 6D Have you heard about or visited the web site MakesaMeal.com?
NOTE: Base sizes for frequency of visiting AIPC website too small to analyze.

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Muellers South: Recognition of Barilla Advertising

Four in ten consumers report being aware of an ad featuring authentic Italian recipes (Barilla's ads). This awareness is similar to that reported for the AIPC ad.

- Here, however, consumers clearly associate the ads with Barilla, as over half of those who are aware of the ad based on the description can name Barilla as the sponsor.

	Total Muellers South	Past 6 Months Brand Usage				
		Muellers	Barilla	Creamette	Ronzoni	Store Brand (net)
	A	L	M	N	O	P
	%	%	%	%	%	%
Whether Remember Barilla Ad Based on Description						
Base - Those Aware of Any Advertisement	(218)	(135)	(95)*	(38)*	(45)*	(135)
Yes	39	39	49 P	42	44	38
No	61	61	51	58	56	62 M
Brand Associated With Advertisement						
Base - Those Aware of Any Advertisement and Recall Barilla Ad	(85)*	(52)*	(47)*	(16)**	(20)**	(51)*
Barilla	53	54	60			51
NEW WORLD PASTA (NET)	13	13	9			14
Ronzoni	7	6	4			6
San Giorgio	5	4	4			6
AIPC BRAND (NET)	5	4	2			4
None/nothing	5	6	4			4
Don't Know/Remember	24	23	21			29

Q. 7A Do you remember any type of pasta advertising featuring authentic Italian recipes and pasta from Italy?
Q. 7B What brand was being advertised?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
** Base size too small to analyze.
Only mentions of 5% or more in any column shown (for Q. 7B).
Stats testing not appropriate on open-ended questions (Q. 7B).

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Muellers South
Brand Awareness and Purchase Behavior

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Muellers South: Brand Awareness

In the Muellers South region, awareness of Muellers is much higher than awareness of Barilla.

- Unaided awareness of Muellers is twice that of Barilla.
- Nine in ten or more consumers are aware of Muellers, one or more New World Pasta brands, and one or more Store Brands.
  - Within the New World Pasta portfolio of brands, both Creamette and Ronzoni are familiar brands to consumers.
  - Several private label brands have strong awareness, including Publix, Kroger, Great Value, and Food Lion.
- Eight in ten are aware of the Barilla brand.

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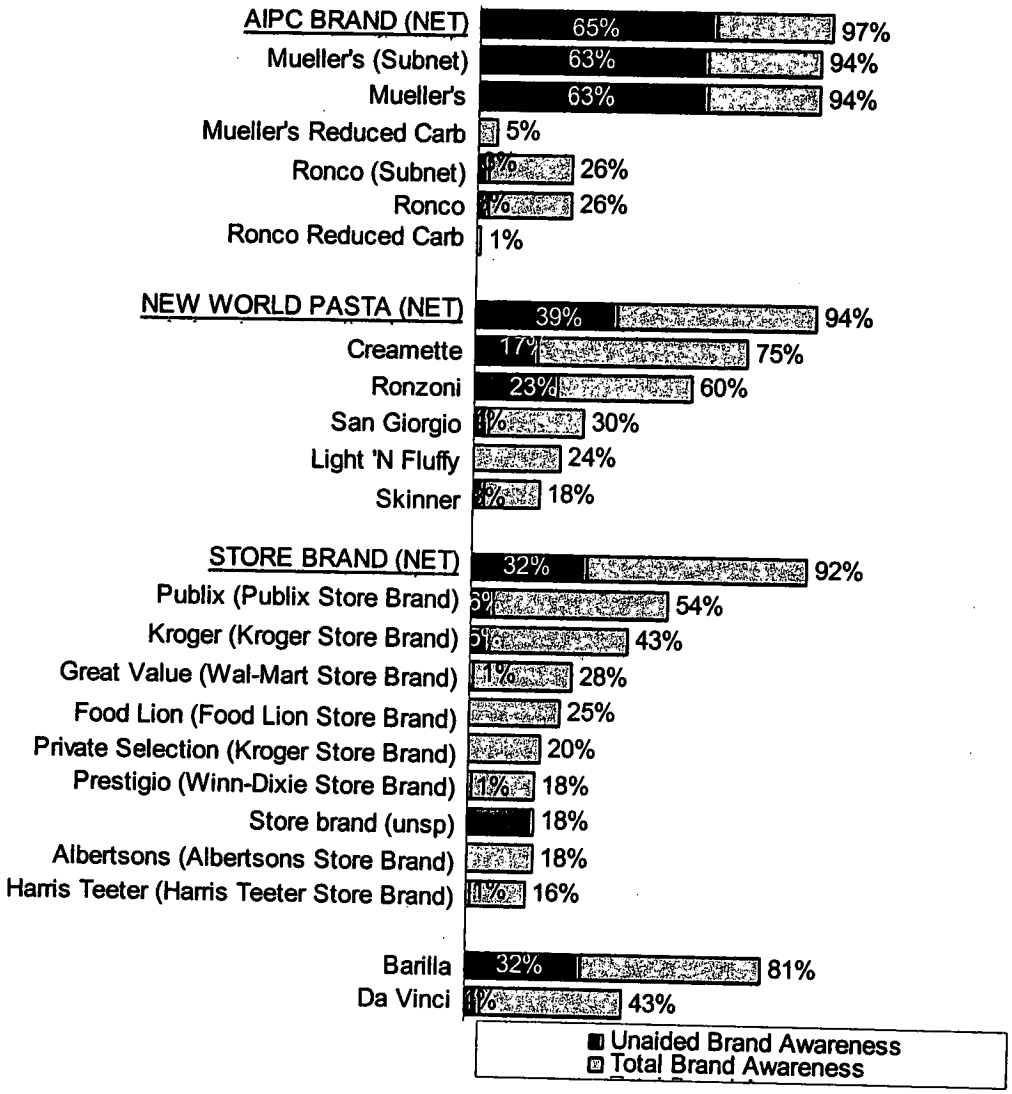
Muellers South: Brand Awareness



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Q. 1 Thinking about brands of packaged dry pastas, which pasta brands come to mind?
Q. 3 You may have already mentioned some dry pasta brands you have heard of. Using the list below, please indicate ALL of the following dry pasta brands you have EVER heard of, including those brands you may have already mentioned.
Only brands with mentions of 7% or more in either column shown except for AIPC brands which are all listed. Only store brands with 15% or more total awareness shown.

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Muellers South: Awareness-To-Purchase Conversion Rates

Muellers has by far the best conversion rate of any name brand pasta, meaning that it does the best job of converting those aware of the brand into purchasers.

- Conversion rates for the other brands are far below that of Muellers. Barilla is the name-brand product with the next-highest conversion rate.

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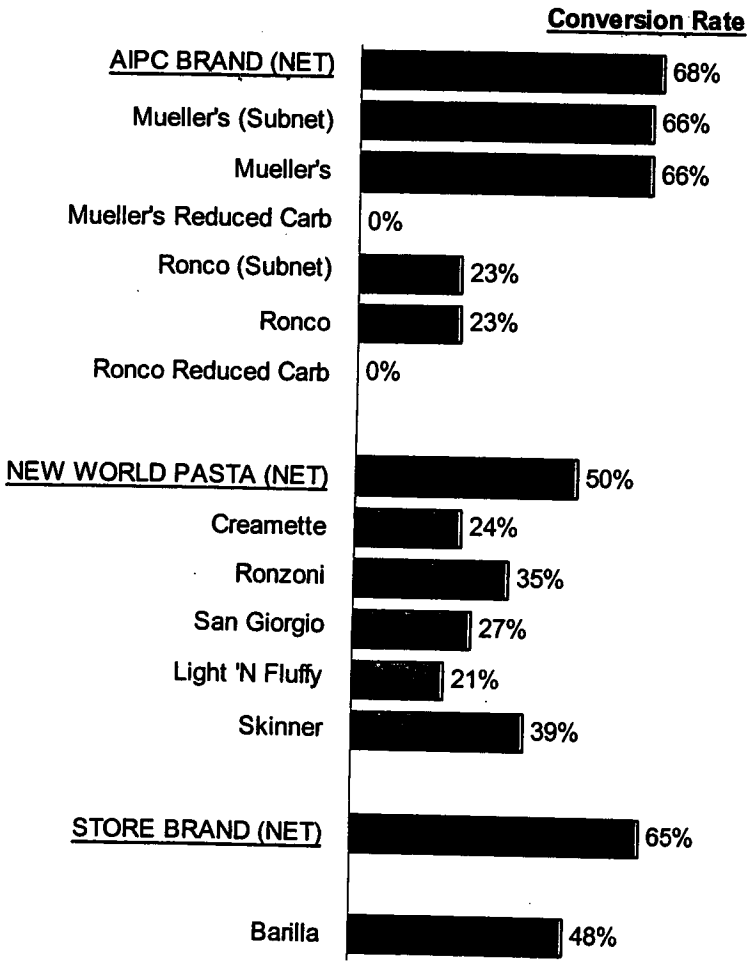
Muellers South: Awareness-To-Purchase Conversion Rates (continued)



	Total Brand Awareness	% Purchased Past 6 Months
AIPC BRAND (NET)	97	66
Mueller's (Subnet)	94	62
Mueller's	94	62
Mueller's Reduced Carb	5	0
Ronco (Subnet)	26	6
Ronco	26	6
Ronco Reduced Carb	1	0
NEW WORLD PASTA (NET)	94	47
Creamette	75	18
Ronzoni	60	21
San Giorgio	30	8
Light 'N Fluffy	24	5
Skinner	18	7
STORE BRAND (NET)	92	60
Barilla	81	39

Q. 1 Thinking about brands of packaged dry pastas, which pasta brands come to mind?
Q. 3 You may have already mentioned some dry pasta brands you have heard of. Using the list below, please indicate ALL of the following dry pasta brands you have EVER heard of, including those brands you may have already mentioned.
Q. 8A Which of the following pasta brands have you purchased in the PAST 6 MONTHS?
Only AIPC brands and major competitors listed.
Conversion ratio calculated as follows: % Purchased Past 6 Months/Total Brand Awareness x 100.

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Muellers South: Past 6 Months Cross-Brand Purchasing

In the Muellers South region, Muellers is a much bigger threat to Barilla than Barilla is to Muellers.

- Muellers has a stronger interaction with Store Brands than with Barilla.

		Past 6 Months Brand Usage				
	Total Muellers South	Muellers	Barilla	Creamette	Ronzoni	Store Brand (Net)
Base: Total Respondents	(300)	(187)	(117)	(55)*	(64)*	(179)
	A	L	M	N	O	P
	%	%	%	%	%	%
AIPC BRAND (NET)	66	100 MNO P	64	76	70	66
Mueller's (Subnet)	62	100 MNO P	62	76 MP	70	62
Mueller's	62	100 MNO P	62	76 MP	70	62
Ronco (Subnet)	6	3	6	2	5	6
Ronco	6	3	6	2	5	6
STORE BRAND (NET)	60	59	50	56	58	100 LMN O
Publix (Publix Store Brand)	19	21	21	15	28 N	32 LMN
Kroger (Kroger Store Brand)	18	14 O	10	20 MO	6	30 LMO
Great Value (Wal-Mart Store Brand)	13	12	12	9	16	22 LMN
Food Lion (Food Lion Store Brand)	5	7 MO	3	16 LMO	-	9 MO
Prestigio (Winn-Dixie Store Brand)	4	5 N	2	-	5	7 MN
NEW WORLD PASTA (NET)	47	51	47	100 LMP	100 LMP	44
Ronzoni	21	24	23	16	100 LMNP	21
Creamette	18	22	18	100 LMOP	14	17
San Giorgio	8	9	11 P	18 LOP	6	6
Skinner	7	6 O	7 O	11 OP	-	4 O
Barilla	39	39	100 LNOP	38	42	33
Da Vinci	10	11	21 LP	15	19 LP	8

Q. 8A Which of the following pasta brands have you purchased in the PAST 6 MONTHS?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 7% or more in any column shown except for AIPC brands which are all listed.

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Muellers South: Brand Purchased Most Recently

Unlike the Muellers North region where purchases of Barilla far exceeded those of Muellers, consumers in the Muellers South region tend to purchase Muellers most often.

- Also, in this area, Muellers is purchased by heavy category users (not light category users as in the Muellers North region).

		Category Usage		
	Muellers South Total	Heavy	Medium	Light
Base: Total Respondents	(300)	(54)*	(86)*	(154)
	A	B	C	D
	%	%	%	%
STORE BRAND (NET)	35	37	44 D	30
Kroger (Kroger Store Brand)	10	11	10	9
Publix (Publix Store Brand)	9	11	13 D	6
Great Value (Wal-Mart Store Brand)	6	6	8	6
Ukrops (Ukrops Store Brand)	2	-	5 D	-
AIPC BRAND (NET)	33	39	26	35
Mueller's (Subnet)	32	39 C	24	34
Mueller's	32	39 C	24	34
Ronco (Subnet)	1	-	1	1
Ronco	1	-	1	1
Barilla	21	35 CD	21	18
NEW WORLD PASTA (NET)	19	19	21	18
Ronzoni	7	7	8	7
Creamette	6	4	9	5
San Giorgio	2	6 D	2 D	-
Da Vinci	3	9 D	3	1
Not Specified	4	-	1	6 BC

Q. 9 Which of the following pasta brands have you purchased most recently?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 5% or more in any column shown except for AIPC brands which are all listed.

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Muellers South: Frequency of Purchasing On Sale or With Coupon

Kroger's Store Brand is reported to be frequently purchased on sale or with a coupon; Walmart's Store Brand is very rarely purchased on sale or with a coupon.

Base: Those Aware of Advertisement	Muellers (187) A %	Barilla (117) E %	Creamette (55)* H %	Ronzoni (64)* L %	Store Brand (Net) (179) O %	Kroger (54)* P %	Great Value (40)* Q %	Publix (57)* R %
Frequently	34 Q	32	27	28	36	46 EHLQ	20	37 Q
Occasionally	29	29	25	33	25	20	28	25
Sometimes	20 Q	21 Q	27 QR	30 QR	18	20 Q	5	14
Never	17	18	20	9	28	13	48 AEHL PR	25 L

Q. 8B For all the brands you have purchased in the past 6 months, please indicate how often you purchase the brand ON SALE OR WITH A COUPON.
Columns tested: A/E/H/L/O/P/Q/R. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Brands not listed have base sizes too small to analyze.

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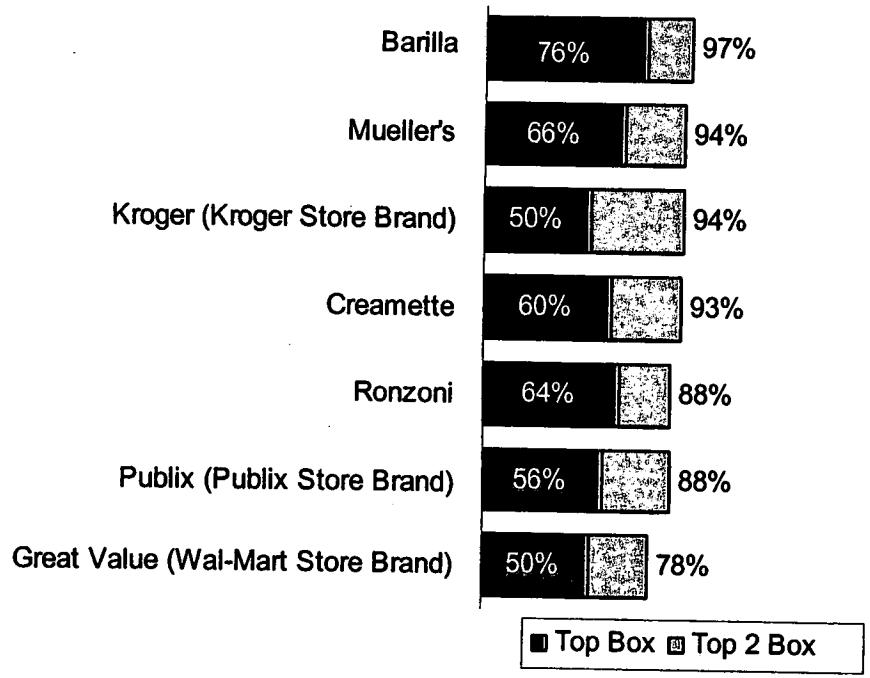
Muellers South: Overall Brand Satisfaction

Muellers users are quite satisfied with the brand's performance. Two-thirds issue top box ratings to the brand and virtually all users issue top two box satisfaction ratings.

- However, Barilla generates even stronger satisfaction ratings, particularly top box scores.
- In addition, satisfaction ratings for Barilla are similar to those reported by consumers in the Muellers North territory, despite the fact that most other brand-related ratings for Muellers are much stronger in the Southern region.

Overall Brand Satisfaction



Q. 12 Using the 5-point scale provided, please indicate how satisfied you are with each brand listed.
Base: purchased brand in past 6 months.

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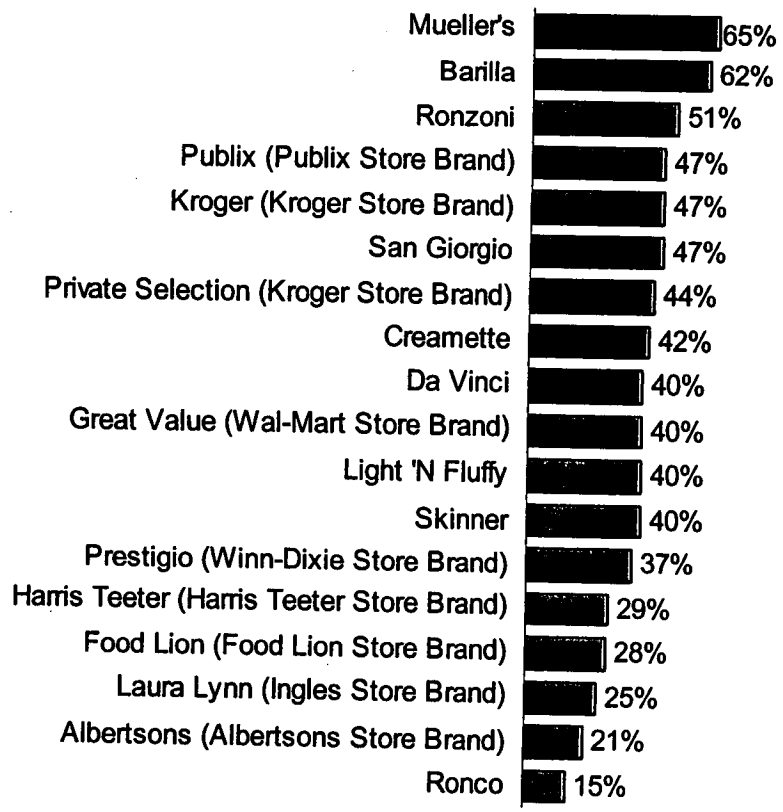
Muellers South: Future Purchase Intent: % Top 2 Box

Muellers and Barilla secure the strongest ratings for future purchase intent.

- Scores for Muellers are just slightly higher than those achieved by Barilla.
- This is in contrast to the findings in the Muellers North area, in which Barilla was issued higher purchase intent scores than Muellers.



Q. 11 Using the scale below, please indicate how likely you are to purchase each of the following brands in the next 6 months.
Base: Aware of given brand.

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Muellers South: One Pasta Brand Plan to Purchase Next

Similar to Muellers North, in the South one-third of consumers say they make their decision regarding the pasta brand to purchase at the store shelf.

- Muellers is most often mentioned as the pasta brand consumers intend to purchase next. Barilla receives only half as many mentions as Muellers.
- Contrary to earlier findings, here light category users are the ones most likely to name Muellers as the brand to purchase next whereas heavy category users typically choose Barilla.

		Category Usage			
	Total Muellers South	Heavy	Medium	Light	Likely to Buy Low Carb Pasta
Base: Total Respondents	(300)	(54)*	(86)*	(154)	(99)*
	A	B	C	D	S
	%	%	%	%	%
AIPC BRAND (NET)	24	22	16	31 C	26
Mueller's (Subnet)	24	22	16	29 C	26
Mueller's	19	19	13	23 C	12
Mueller's Reduced Carb	5	4	3	6	14
Ronco (Subnet)	1	-	-	1	-
Ronco	1	-	-	1	-
STORE BRAND (NET)	17	19 D	29 D	9	9
Publix (Publix Store Brand)	5	6	10 D	3	5
Kroger (Kroger Store Brand)	5	7	7	3	2
Great Value (Wal-Mart Store Brand)	2	2	3	2	-
Barilla	12	20 D	10	9	14
NEW WORLD PASTA (NET)	10	7	14	8	8
Creamette	3	2	6	2	2
Ronzoni	2	4	3	1	1
San Giorgio	2	2	3	1	3
Doesn't matter, I make my decision at the shelf	35	30	29	40 C	41

Q. 10A Which ONE brand of pasta do you plan to purchase the next time you purchase pasta?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 3% or more in any column shown except for AIPC brands which are all listed.

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Muellers South: Brand Most Preferred

Muellers is most often named consumers' preferred brand of pasta.

- Mentions of Barilla are far less than that of Muellers.

	Muellers South Total	Category Usage		
		Heavy	Medium	Light
Base: Total Respondents	(300)	(54)*	(86)*	(154)
	A	B	C	D
	%	%	%	%
AIPC BRAND (NET)	39	35	34	44
Mueller's (Subnet)	38	33	34	42
Mueller's	38	33	34	42
Ronco (Subnet)	2	2	-	3
Ronco	2	2	-	3
Barilla	22	24	17	23
NEW WORLD PASTA (NET)	20	19	28 D	15
Ronzoni	10	13	12	7
Creamette	7	2	12 B	6
San Giorgio	2	4	5 D	1
STORE BRAND (NET)	14	15	15	14
Publix (Publix Store Brand)	5	6	5	5
Kroger (Kroger Store Brand)	4	6	3	5
Great Value (Wal-Mart Store Brand)	2	-	3	3
Da Vinci	3	6	2	2

Q. 10B Of the following brands you have seen or heard of, please indicate which one brand would be your most preferred brand?
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.
Only mentions of 3% or more in any column shown except for AIPC brands which are all listed.

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Muellers South: General Pasta Brand Attitude

The majority of consumers believe that some pasta brands are better than others and feel it is important that they buy one of the better brands.

- Heavy users are particularly likely to agree with this statement.

		Category Usage			Carbohydrate Interest	
	Total Muellers South	Heavy	Medium	Light	Curent Low Carb Dieter	Likely to buy Low Carb Pasta
Base: Total Respondents	(300)	(54)*	(86)*	(154)	(38)*	(99)*
	A	B	C	D	O	P
	%	%	%	%	%	%
Some pasta brands are better than others and it is important that I buy one of those	44	56 D	44	41	50	46
Some brands are better than others, but it's not that important which brand of pasta I buy	30	22	29	32	34	28
All the pasta brands are about the same, so it doesn't matter to me which one I buy	21	19	22	21	8	20
One pasta brand is best and it is important to me to always buy that brand	5	4	5	6	8	5

Q. 14B Using the scale below, please indicate how important each of the following statements are to you when considering which brand of pasta to buy.
Columns tested: B/C/D. Capital letters indicate differences at the 90% confidence level.
* Caution: small base size.

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Muellers South: Demographic Profile by Brand Users

No major differences exist across brand user groups.

	Total Muellers South	Past 6 Months Brand Usage				
		Muellers	Barilla	Creamette	Ronzoni	Store Brand (net)
	A	L	M	N	O	P
	%	%	%	%	%	%
Mean Age	40.4	40.7	39.9	40.3	40.5	40.1
Marital Status						
Married	74	73	70	78	77	74
Single (Net)	26	27	30	22	23	26
Never married	14	15	20 P	11	11	11
Divorced/separated	12	12	10	11	13	15
Widowed	0	-	-	-	-	1
Employment of Female Head of Household						
Employed (Net)	77	76	81	78	84	76
Full time	68	65	73	71	73	68
Part time	9	11	9	7	11	8
Not Employed (Net)	21	23	17	20	14	22
Retired	1	1	-	-	-	-
Homemaker	18	18	15	16	11	18
Other	3	4	2	4	3	4
Not specified	2	1	2	2	2	2
Education						
High School Graduate	13	13	14	13	14	11
Some College	30	30	27	24	28	31
College Graduate	39	41	38	49	36	39
Post Graduate	18	16	21	15	22	19
Mean Household Income (in 000s)	74.6	73.1	74.9	71.4	75.0	72.8
Mean Household Size	3.0	3.0	2.9	3.2	3.0	3.1
Mean Number of Children in Household Under 18	1.7	1.7	1.7	1.8	1.7	1.7
Race of Female Head of Household						
White	89	88	89	91	91	88
Non-White (Net)	9	10	9	7	6	9
Black	7	9	8	7	6	7
Asian/Pacific Islander	2	1	2	-	-	2
Other	2	2	2	2	3	3

Q. S3: Please indicate your age.
Q. S6: What is the highest level of education you have completed?
Q. S5: Which of the following best describes your total yearly household income?
Columns tested: L/M/N/O/P. Capital letters indicate differences at the 90% confidence level.
Marital status, employment, household size, number of children, and race of female head of household obtained from panel data.

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Muellers South Category Drivers

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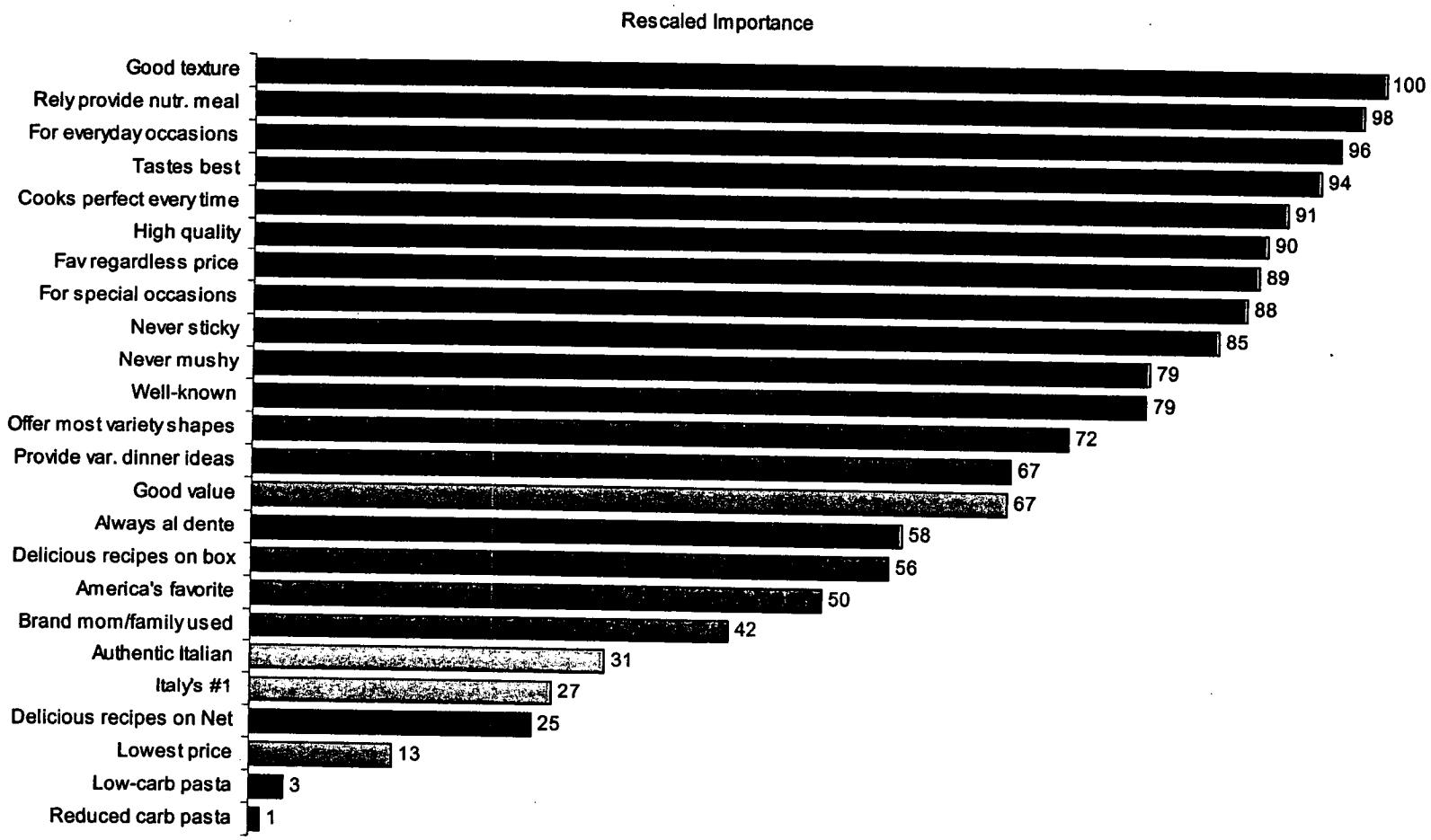
Muellers South: Category Drivers

As in most other territories, providing a pasta that offers a Consistent Taste & Texture is critical in the Muellers South geography.

- Having a good texture and being a brand consumers can rely on to provide a nutritious meal are most important.
- Next most important is one of the attributes related to Inspiration & Versatility: being a brand that consumers can rely on for everyday occasions.
- Then, several Consistent Taste & Texture are viewed as important:
  - Tastes best
  - Cooks perfectly every time
  - High quality
  - Favorite brand regardless of price
  - Being a brand consumers can rely on to for special occasions.
  - Never sticky
  - Never mushy
- Being a low/reduced carb brand and attributes related Heritage & Authenticity are of little importance to consumers.
  - Being a good value is of mid-level importance, though being a low priced brand is not.

Importance Hierarchy



Muellers South Market Structure

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Muellers South: Market Structure

In the Muellers South territory, there are many different pasta brands being marketed.
Of all brands, Muellers has the most unique brand image, as evidenced by its distance from the other brands on the map and the fact that it falls far away from the map's center.

There are many brands offered in the Total Muellers market area. None is strongly aligned with the most critical elements – those related to providing a Consistent Taste and Texture.

- San Giorgio comes closest to being aligned with such attributes, though even this brand does not perform particularly well in this area.

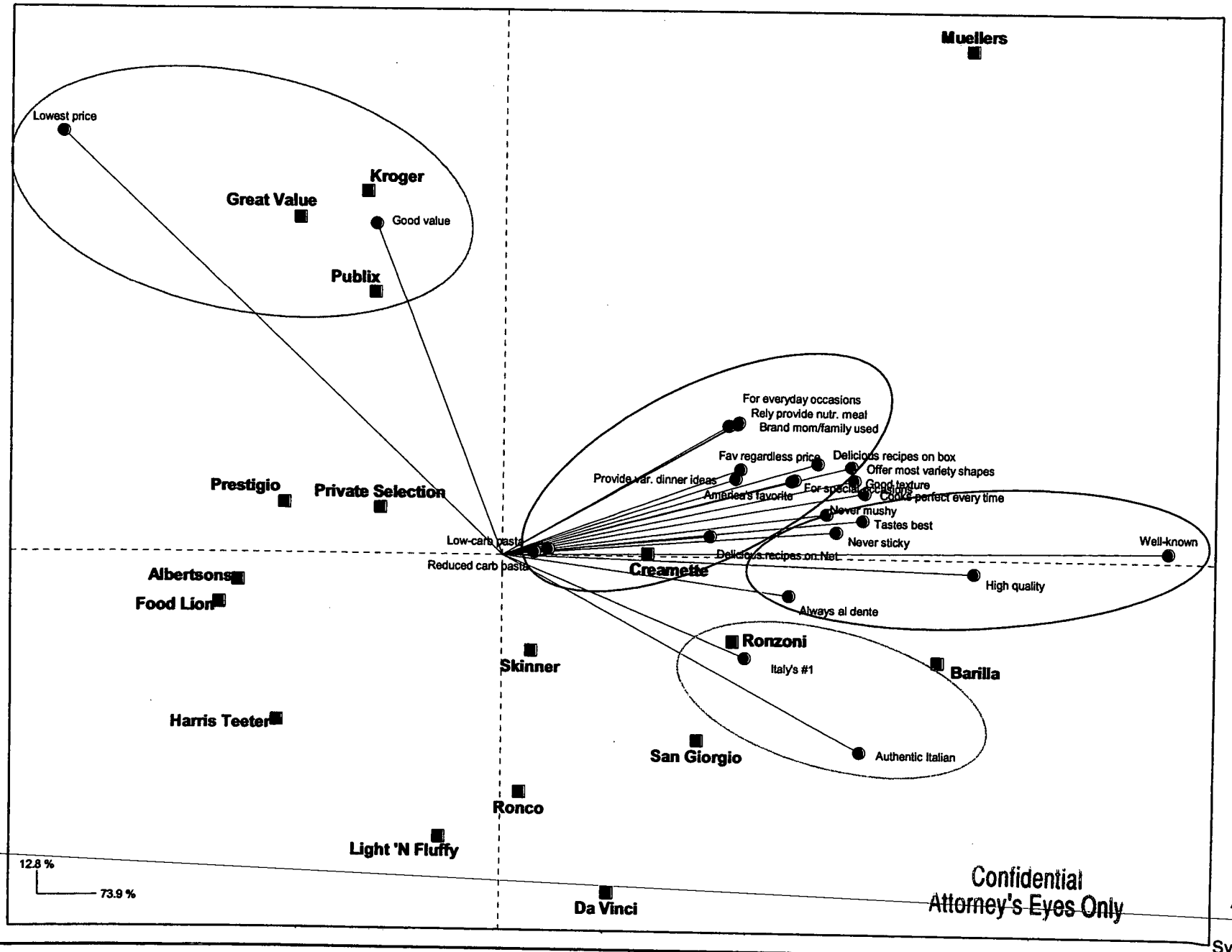
Skinner, Prince, Creamette, Ronco, and Light 'N Fluffy are all perceived similarly.

Barilla has a quite unique brand image, and is highly associated with "Authentic Italian", "Always al dente", and "Italy's #1".

Store Brands align closely and are associated with attributes related to Price/Value.

- Giant, Publix, Great Value, and Kroger are perceived similarly and are seen as a good Price/Value.
- Harris Teeter, America's Choice, Albertsons, Food Lion, Private Selection, and Prestigio are perceived as similar.

Muellers South



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Muellers South
Brand Image Analysis

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Mueller South: Brand Image Analysis

Muellers has a very strong brand image in the market.

- It is rated highly on several very important attributes: being well-known, offering pasta in a variety of shapes, and being a favorite brand regardless of price.
  - In addition, it is rated highly on several attributes that are not quite as critical to consumers – being America's favorite, being a brand mom/family used, and having delicious recipes on the box.
- The brand's performance might be improved if it could change perceptions in a few critical areas: having a good texture, being a brand consumers rely on for everyday occasions, and being a good value.

Ronco does not have a well-defined brand image – it is rated average on virtually all attributes.

- The same is true for the Skinner brand.

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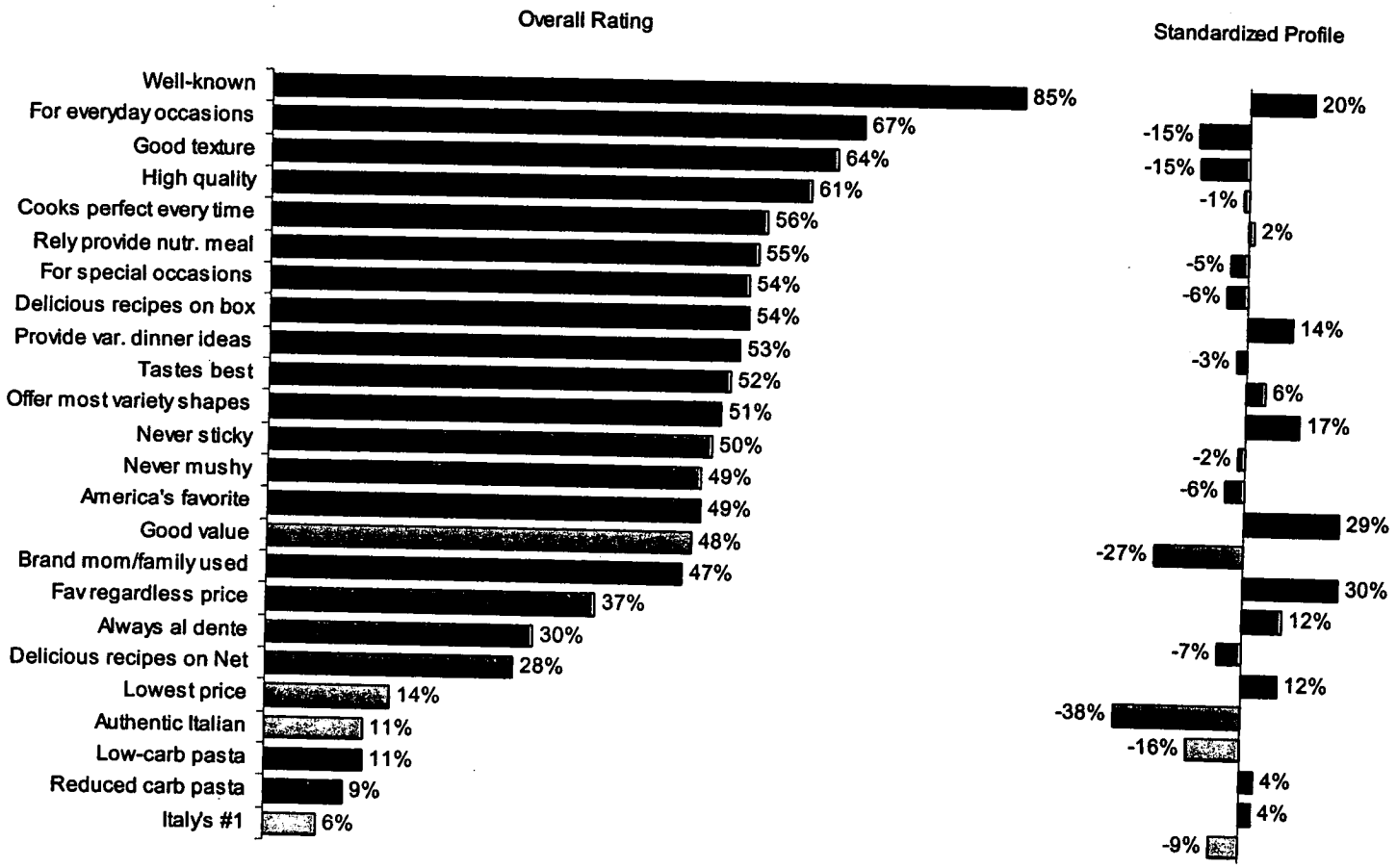
Mueller South: Brand Image Analysis

Barilla is rated highly for being:

- Authentic Italian pasta
- Italy's #1 brand
- Always Al Dente
- Consumers favorite brand regardless of price
- High quality
- Tastes best
- Its weaknesses are similar to Muellers: having a good texture, being a brand consumers rely on for everyday occasions, and being a good value.
    - It also performs poorly for providing a variety of dinner ideas.

All Store Brands offer low prices/good value but are not well-known.

Image Profile – Muellers



Strategic Matrix – Muellers

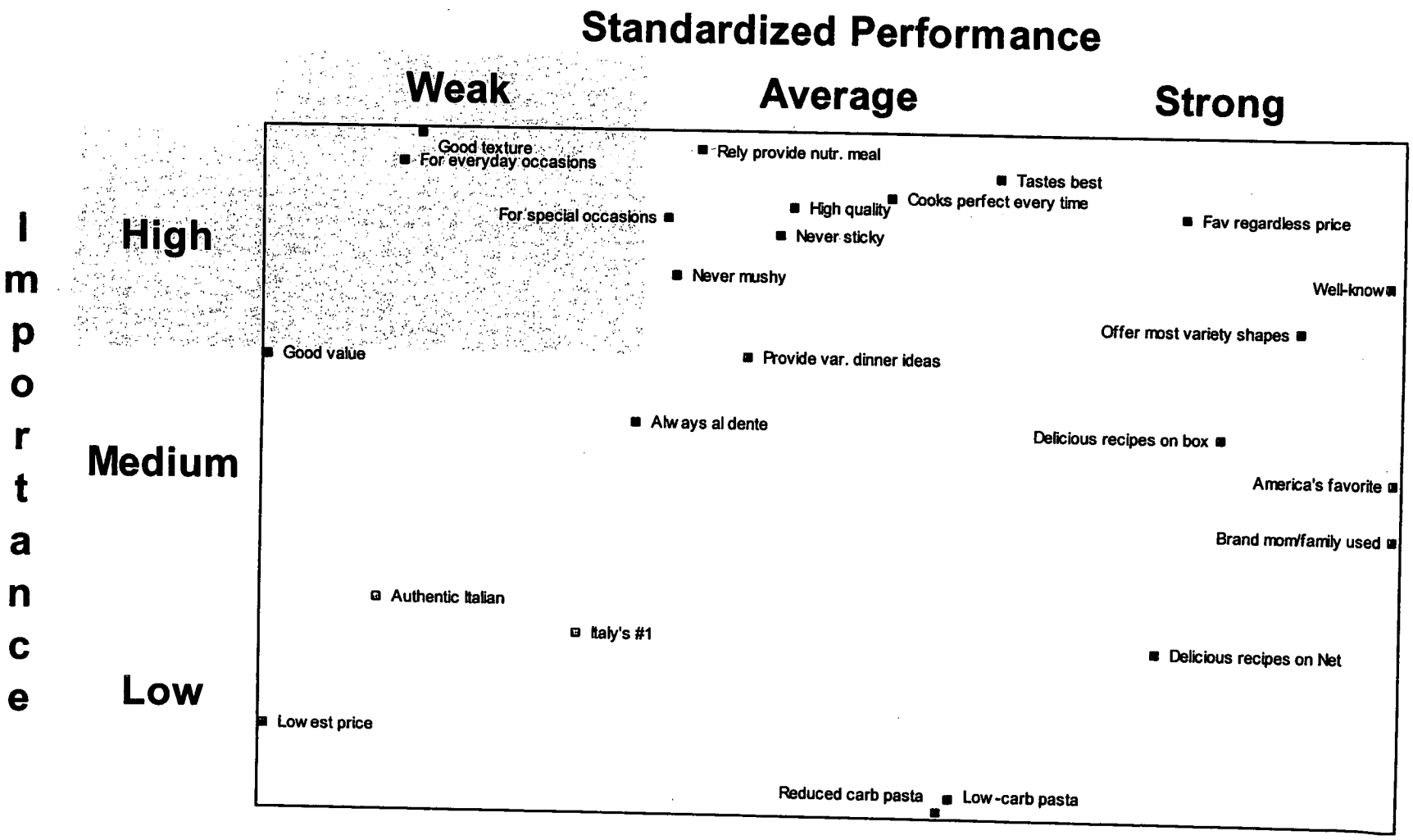


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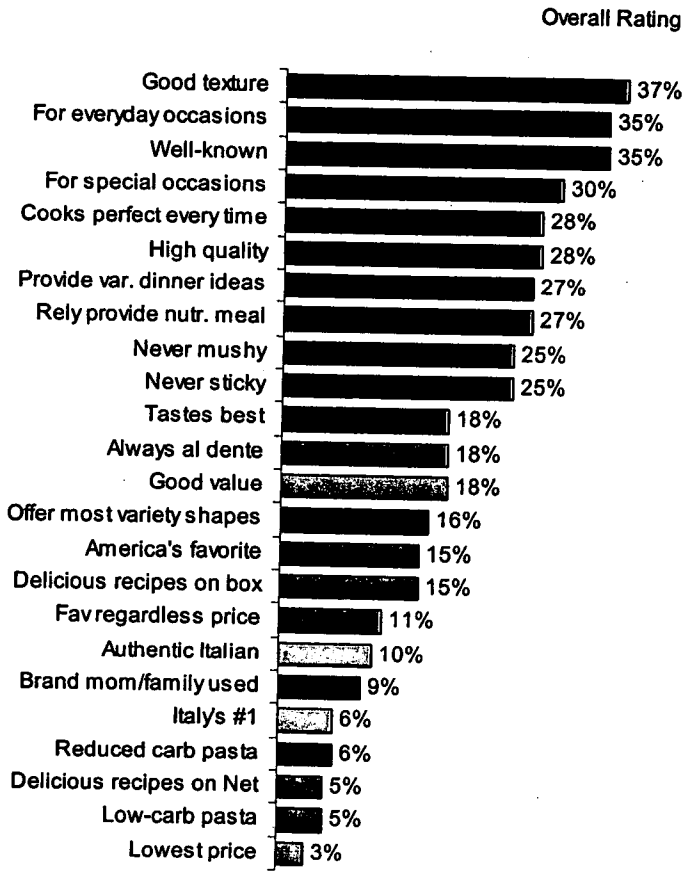
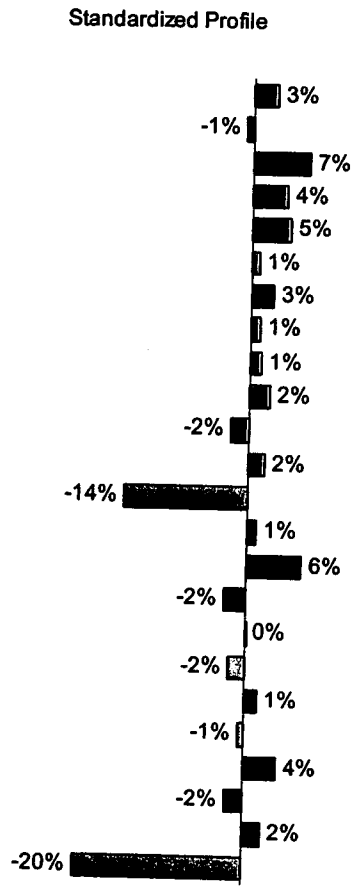
Image Profile – Ronco





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