IDENTIFYING HIGH-POTENTIAL MARKET OPPORTUNITIES IN NORTH AMERICA FOR LATIN AMERICAN AND CARIBBEAN AGRO-INDUSTRIAL FIRMS

Deloitte & Touche

March 1992

PROGRAM IV: TRADE AND AGROINDUSTRY

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INTER-AMERICAN INSTITUTE FOR COOPERATION ON AGRICULTURE/ CANADIAN INTERNATIONAL DEVELOPMENT AGENCY PROJECT

The general objective of the IICA/CIDA Project is to strenghten the conceptual and operational development of IICA's five Programs of action, in the technical areas having high priority in the Institute's Medium Term Plan and the PLANLAC. Through the IICA Programs, the IICA/CIDA Project, with the collaboration of Agriculture Canada, supports the efforts of the countries to reactivate and modernize their agricultural sectors, in a framework of ever-improving relations between Canada and the countries of Latin America and the Caribbean.

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FOREWORD

One of the objectives of the joint venture project between the Inter-American Institute for Cooperation on Agriculture (IICA), Agriculture Canada (AGCAN) and the Canadian International Development Agency (CIDA), specifically as concerns agroindustry and trade, is to increase knowledge in the countries of Latin America and the Caribbean (LAC) concerning the characteristics and peculiarities of North American markets, as a means of expanding opportunities and promoting new and better trade relations.

This monograph, prepared by the external consultants Deloitte & Touche (Guelph, Ontario, Canada), constitutes a significant step toward reaching that goal.

The document identifies the main trends and factors affecting the demand for processed products on the principal North American markets. It also identifies ten groups of processed agricultural products, demand for which is growing dynamically. Four of these –processed meats and tropical fruits, natural edible and inedible additives– were given priority because of the strong possibility of their being supplied by LAC. The material contained in this monograph represents a synthesis of the complete work; detailed studies are available for consultation at IICA Headquarters. The monograph also includes a helpful guide for identifying market opportunities as seen from the perspective of export promotion.

It is our hope that this document will prove to be useful and of value to professionals working in this field and, in general, all those persons interested in the development of the food industry.

Rodolfo Quirós Guardia, Director
Trade and Agroindustry Program

EXECUTIVE SUMMARY

The overall size of the North American market for the products of agroindustrial firms is vast—supermarket sales alone were US$260 billion in 1989 and total agroindustrial product sales in all sectors exceeded US$500 billion for the continent as a whole. There is no definitive means of identifying "surefire" market opportunities; if there were, market forces would ensure that returns to the "winners" would be substantially diluted as firms rushed to satisfy the demands of the marketplace. However, there are mechanisms by which the many and varied wants of consumers can be winnowed to provide the agroindustrial firms with a short list of product categories and specific products that may offer better-than-average potential in North American markets. Actually realizing the market potential, of course, will be contingent upon many factors, not least the management skills of the individual firm and on the whims of the marketplace.

A summary is presented below (Table 1) of the major steps in identifying marketing opportunities with high potential for LAC firms. The seemingly logical flow should not be interpreted as if export market opportunity identification is a "push-button" exercise — it requires experience, skill and considerable luck to pick market winners: and a winner is not a winner until a firm takes successful commercial advantage of its market foresight.

Using a step-wise approach to market opportunity identification, a short list of product categories and specific products that offer high potential for LAC agroindustrial firms has been developed; these are presented in Table 2. Each product category is scored on the extent to which it satisfies the requirements of ten key criteria that help determine export market potential.

Four product categories were selected as indicating particularly strong market potential for LAC firms and industry experts prepared reports on specific market opportunities and requirements to penetrate key markets in each of the four areas. The market studies confirmed that for the LAC firm distanced geographically, culturally and commercially from the export marketplace, it is often a wise strategy to link up with a North American-based firm to reduce the costs and risks of new product development and launch. The extent of the linkage will depend upon the specific needs of the LAC firm and its potential North America partner, but could range from simple product licensing arrangements through to full-fledged joint venture participation. LAC firms should not wait for a willing North American suitor to make the first move; they should take the initiative and show potential cooperating firms that they can play an active part in developing profitable market opportunities. It is salutary to remember that the large majority of new products fail to become established in the North American market. A partner with a hand constantly on the pulse of the market can help the LAC firm reduce the risk of entry into one of the largest, most competitive and, potentially, most profitable marketplaces in the world.

Table 1. A Step-Wise Approach to the Identification of Marketing Opportunities for LAC AgroIndustrial Firms.

Identify expanding demand categories for agriculturally-based processed products-food and non-food:

- Monitor new product introductions in trade press (food service, food retail, non-food areas such as flavours and essences, cosmetics, etc.);
- Monitor sales growth of major product categories vis-à-vis: industry averages, investigate within-category growth rates of individual products. Use trade press sources and ad hoc market surveys undertaken by key agencies (ITC, USAID, export development agencies in the LAC region, etc.);
- Review government statistics in market countries on food product disappearance trends, import data at 4 digit SITC level;
- Review import volumes and values at micro-level from LAC country sources via OAS SICE system;
- Talk with trade members and observe market movements directly through ad hoc in-store surveys, etc.;
- Prepare a long short-list of products with prima facie strong market potential.

Do major market trends support the view that the short-listed products have strong market potential and continue to show sustained growth?

- Discern major market trends through synthesis of information from trade press, conferences/seminars on market matters, government and regional agency market outlook statements, contact with trade, visiting trade fairs, etc.
- Do the items on our long short-list meet the market requirements identified through a review of the key trends in the industry?
- Refine short-list.

Are there particularly attractive opportunities for LAC agroindustrial products that are focused specifically at the LAC consumer niche markets in North America?

- Monitor trade press that focuses on Caribbean and Hispanic market segments;
- Canvass views of Caribbean and Hispanic food marketing trade and undertake ad hoc store surveys in consumer stronghold locations;
- Review data on import volumes, values, shippers, receivers etc. for specialty products from OAC SICE service;
- Add high potential specialty Caribbean and Hispanic products to short-list.

Identify specific target markets for the high potential products

- Are the target markets accessible?
- Are they sufficiently large to be commercially attractive?
- What is the distribution channel network to reach the target market and can it be accessed?
- Refine short-list.

Which high market potential products best fit the supply potential and supply capabilities of the LAC country concerned?

- Review short-listed products with supply-side firms, export market development agencies. Do they agree on market potential? Identify non-listed products and establish market potential bona fides. Are there unique products (e.g., processed fruit product from a species only known in one country) that can be added to short-list? Are there counter-seasonal supply opportunities and/or emerging market opportunities because of declining supplies from traditional suppliers?
- Review supply-side production and marketing constraints associated with launching a sustained export drive for the short-listed products. Are there insuring a sustained export drive for the short-listed products. Are there insuring a sustained export drive for the short-listed products. Are there insurmountable constraints that preclude exporting certain items. Revise short-list.
- Review short-list in the light of their relative economic attractiveness (e.g., foreign exchange - generating, labour intensive, etc.). Weight accordingly to reflect national development priorities.

Check short-list against government and private trade barriers to export market entry.

- Evaluate impact of tariffs, quota policy, animal and plant product inspection requirements, processing plant inspection, packaging and labelling regulations, consumer welfare/food safety regulations, etc. on imported items, Are there any imported products in the target market? If not, why?
- For the short-listed items, is there room in the market for new suppliers? i.e., is the market structure and conduct such that a new supplier can enter the market?
- Is there minimum size of shipment that must be made and can the LAC firm(s) meet this minimum?
- Refine short-list.

Identify processing technologies that are consonant both with final product market requirements and supply-side technological capability.

- Which of the short-listed items can be manufactured using promising appropriate technologies that can assist in differentiating the product(s) from traditionally processed items?
- Can the LAC firm(s) consistently meet the technological requirements of the market?
- What are the opportunities for technology information sharing/joint-venture developments with market-side firms?
- Refine short-list.

Assess the relative profitability of the short-listed product showing strong market potential.

- On a prima facie basis, which of the products on the refined short-list looks as if it would be the most profitable for the exporter(s)?
- Which would be the easiest from an initial market entry perspective?
- What is the risk coefficient for each item?
- Which items best suit the resources, experience and business philosophy of the exporter(s)?

Present a synopsis of market opportunities for high export market potential products.

- Prepare a one page marketing overview plan for each prospect identifying target market, present market situation, marketing resource requirements, marketing strategy, review of opportunities and risks, etc.

Table 2. High-potential product categories for LAC firms in North American markets and their relative strengths: key criteria for attaining export market success.

Product criteria category	Dried fruits		Fruit juice products					
	Fruit Leathers	Tropical Fruit Bits	Tropical juices (S/S, Concs.)	Berry juices (S/S, Concs.)	Purees, nectars tropical/ berries	Fruit essences	Tropical fruit chunks frozen/ packed in juice, etc.	"Fresh" frozen gourmet vegetables and herbs
Expanding demand category?		X	XX	XX	XX	XX	XX	XX
Consonant with major market trends?	X	XX	XX	XX	XX	XX	XX	XX
LAC consumer niche market in North America?			X		X	X	X	
Target market accessible & commercial scale?	X	X	X	X	X	XX	XX	XX
Has production potential in LAC region?	XX	XX	XX	X	XX	XX	XX	XX
LAC-side supply constraints manageable?	X	X	X	X	X	X	X	X
Export market-side barriers to entry manageable								
– government?	XX	XX	XX	X	X	X	X	X
– private trade?	X	X	X	XX	X	X	X	X
Opportunity to differentiate product with appropriate technology, innovative processing & packaging?	XX	X	XX	X	XX	X	XX	XX
Offers LAC attractive economic benefits?	XX	XX	XX	XX	XX	XX	XX	XX
Profitability for firm looks attractive?								

Table 2. High-potential product categories for LAC firms in North American markets and their relative strengths: key criteria for attaining export market sucess (Continued).

Product criteria category	Exotic grains and pulses	Pre-cooked, sliced deli meat	Surimi processed fish products	Exotic sauces & sauce ingredients	Natural spices & flavoring mixes	Speciality coffees	Speciality — & herbal teas	Niche products for LAC consumers in North America	Natural ingredients for cosmetics and pharmaceuticals
Expanding demand category?	XX	X	XX	X	X	X	X	X	XX
Consonant with major market trends?	XX	X	XX	X	X	X	X		XX
LAC consumer niche market in North America?	X		X	XX	X			XX	
Target market accessible & commercial scale?	X	XX	X	X	X	X	X	X	XX
Has production potential in LAC region?	XX	X	X	XX	XX	X	X	X	X
LAC-side supply constraints manageable?	X	X	X	X	X	X	X	X	X
Export market-side barriers to entry manageable									
— government?	X		X	X	X	X	X	X	XX
— private trade?	X	X	X	X	X	X	X	X	X
Opportunity to differentiate product with appropriate technology, innovative processing & packaging?		XX	XX	XX					
Offers LAC attractive economic benefits?	X	XX	XX	XX	XX	XX	XX	XX	XX
Profitability for firm looks attractive?									

Source: Deloitte & Touche, Canada. Inter-American Institute for Cooperation on Agriculture.

1. INTRODUCTION

The raw, semi-processed and final products of agroindustrial firms are legion; not only do they populate the product markets of the food and feed industries, but also textiles, pharmaceutical, footwear, petro-chemical (e.g., yeasts) and cosmetics. Indeed, fully 40 percent of the Standard Industrial Trade Classification (S.I.T.C.) codes cover trade areas that comprise products with an agricultural raw material origin.

Patently, there is no definitive means of identifying "surefire" market opportunities for agroindustrial products; if there were, then market forces would ensure that returns to the "winners" would be substantially diluted as firms rushed to satisfy the various "wants" of the marketplace. However, there are means by which the many and varied consumer demands can be winnowed to provide LAC agroindustrial firms with a short list of products that may offer "better than average" potential in North American markets; actually realizing this potential, of course, will be contingent upon the whims of the marketplace and the management skills of the firm in implementing export market projects.

The winnowing mechanism outlined in the next section of this volume provides one approach to identifying North American market opportunities for LAC agroindustrial firms. The mechanism is focused on markets for consumer food products, i.e., the finished products presented on the retail shelf or in the restaurant, and the products that are the ingredients for further processed food products. Cursory account is taken of non-food industrial markets for LAC agroindustrial products. This is followed by a review of high-potential products of LAC firms in North American markets. The product categories were selected using key criteria identified as the components of the winnowing mechanism in the first section. In the final section, the conclusions drawn from four high potential market sector studies –processed meat, processed fruits, edible and non-edible natural additives– are delineated. The studies are presented in their entirety in accompanying Volumes II through V of this series of reports.

2. A STEP-WISE APPROACH TO MARKETING OPPORTUNITY IDENTIFICATION

Identify Major Trends that Determine the Changing Patterns of Product Category Sales Growth

First, and fundamentally, any mechanism for identifying market opportunities must, by definition, be market-driven. One way to satisfy this requirement is to focus on what is happening in the marketplace and to understand the major trends that are driving market change.

Table 3. Major categories of products in North American supermarkets.

Grocery Edibles	Perishables
Baby foods	Bakery foods-packaged
Baking needs	Dairy products
Beer and wine	Deli
Breakfast foods	Florals
Candy and gum	Frozen foods
Canned fish	Ice cream
Canned fruit	In-store bakery
Canned meat and specialty foods	Meat
Canned vegetables	Produce (fruit and vegetables)
Coffee and tea	
Cookies and crackers	**Grocery – Non Edibles**
Desserts and toppings	Household supplies
Diet and low-calorie foods	Paper, plastic, film and foil
Dried fruit	Pet foods
Juice	Tobacco products
Nuts	
Pasta	**General Merchandise**
Pickles and olives	Health and beauty aids
Rice and dried vegetables	
Sauces and dressings	**Unclassified**
Snacks	e.g., pharmacy, liquor, sit-down eating, etc.
Soft drinks and mixes	
Soup	
Spices and extracts	
Spreads and syrups	

Table 4. Product category sales performance that exceeded overall supermarket sales performance, 1985-1989.

Category name	Average annual sales growth rate (5 year compounded)	Sales '89 vs '88 % increase	% of supermarket sales
Dried fruit	13.5	3.0	0.2
Deli	9.4	12.8	2.7
Pasta	9.3	8.2	0.6
Baby food	9.3	14.0	0.6
Breakfast Foods	8.9	10.9	2.5
Fresh Produce	8.0	8.2	9.5
Rice & Dried Vegetables	7.6	6.5	0.4
Snacks	5.8	7.0	4.0
Health & Beauty Aids	6.4	5.0	4.0
Soft Drinks & Mixes	5.8	7.0	4.0
Desserts & Toppings	5.8	4.7	0.3
Paper, Plastic, Film, Foil, etc	5.6	7.9	3.8
Juice (Grocery)	5.4	5.1	1.4
Sauces & Dressings	5.4	5.5	1.6
Cookies & Crackers	5.3	9.8	2.2
Spices & Extracts	5.2	6.7	0.4
Soups	5.2	7.5	0.7
Total supermarket sales	5.2	7.2	100.0

* Supermarket sales of food and non-food grocery items account for about 70 percent of grocery purchases for the home in North America.

Source: Progressive Grocer, Maclean Hunter Media Inc., Annual Surveys 1985-1989.

The average supermarket store in North America carries upwards of 20,000 items. During the 1980's, new food and non-food products were introduced to the consumer at an inexorably increasing rate; in 1989, 3,500 new food and beverage items were introduced at retail, a 50 percent increase over the number introduced in 1980. Supermarket management, for ease of analysis and review, groups the many products handled by the store into 41 product categories (Table 3). One measure of growth in demand for various retail food products is to monitor the comparative rate of increase in sales for the various product categories, and then explore sales increases within a particular category for the various product groups (e.g., for apricots, raisins, prunes, and pineapple within the dried fruit category) and product types (e.g., toasts, pastries, hot cereals, breakfast additives and natural snacks within the breakfast food category).

In the latter half of the 1980's, annual sales of 17 of the 41 product categories grew at a rate equal to or higher than the average for all supermarket sales (Table 4).

For some categories, a relatively high rate of growth in dollar sales reflects little or no increase in unit sales, but rather unusual inflation in prices associated with escalating raw material prices (e.g., the seemingly healthy performance of the rice and dried vegetables category is largely explained by a relative world shortage of rice in 1988 that pushed international rice prices above more normal 1980's rice prices). But, in particular, for items with substantial value added at the processing level, high rates of annual sales increases over and above store average reflect an increase in the volume of products within the category merchandised by the store; this is an indicator of demand expansion.

The product categories comprise a mix of products; some will have done well and some not so well, but this will be masked by the overall category sales growth coefficient. For example, in the dried fruit category, prune and raisin sales have been buoyant, whereas other dried fruit sales have lagged behind the average sales growth for all supermarket sales. Further, ranking product categories by rate of annual sales growth does not take into account the category's relative importance in overall sales. For example, dried fruit represents only 0.22 percent of total supermarket sales, whereas cookies and crackers, while showing less than half the percentage growth of dried fruit, account for ten times the amount of sales (2.1 percent of total store sales). In Table 5, the ten product categories with the largest dollar volume of sales are presented for the U.S. market: total supermarket sales were $258 billion in 1989; meat sales –$44 billion –account for 17 percent of the total and is the single most important product category, although annual average sales growth for the last five years has been less than that for the supermarket as a whole.

Table 5. Major dollar volume item sales for the supermarket sector in the USA, 1989.

	Sales $ Million	Category Annual Sales Growth over past 5 years (%)
Meat	43.933	4.3
Produce	24.469	8.0
Carbonated Soft Drinks	8.730	5.8
Bakery Foods (Packaged)	8.729	4.3
Cigarettes	8.249	n.a.
Deli	6.897	9.4
Beer	6.306	3.1
Fluid Milk Products	6.230	2.1
Prepared Frozen Foods	4.860	3.5
Ready-to-eat Cereal	4.713	8.9
Total Supermarket	257.600	5.2

n.a.= not available

Source: "Progressive Grocer", Maclean Hunter Media Inc.

The market analyst should also be aware of the quirks of data categorization and presentation by, in particular, the food retailing trade in North America. For example, juice products are included under the category "Dairy Products" (for refrigerated but not frozen juice products —although the composite dairy category had less than average sales growth, refrigerated juice sales increased by a healthy annual 8 percent in recent years) and "Frozen Foods" (for frozen juices— the composite category increased by 5 percent), whereas the major category "Juices (grocery)," itself a category with strong growth, only included canned and aseptically packaged unrefrigerated juice products; in addition, freshly-squeezed juices are generally included under the "Fresh Produce" category.

A cross-check on strong demand, growth product categories is provided by monitoring the rate of introduction of new products, again by product category (Table 6). The rationale is that new products will "rush" to satisfy consumer wants that are currently not being satisfied; therefore, monitoring food product introductions is a means of identifying expanding demand categories as it happens rather than after it happens. The consonancy of the "hot" categories in Tables 4 and 6 underscores the legitimacy of these two means of identifying interesting market prospects, although direct comparisons are obfuscated as the categories are not synonymous. Meals and entrées, for example, the category that led new food product introductions in both 1988 and 1989, are found in four of the retail categories: breakfast foods, dairy products (for refrigerated, not frozen items), canned meats and specialty foods, and in the huge composite category frozen foods. (See Annex A for a comprehensive listing of new food product category performance, 1987-89, in North America.)

Data on product category sales and the introduction of new products largely emanates from trade sources, including the trade press and syndicated/multi-client market research surveys. A list of major trade papers/magazines that cover the food industry (retail and food service) and other industrial sectors that use agriculturally-based processed materials would be so long as to make up a report in itself. Ulrich's International Periodicals Directory for 1989/90 identifies over 2,000 agroindustrial or related periodicals, of which close to half are published in North America (see Annex B for a listing of the subject categories in the Directory that have relevance for firms in agroindustries). As a rule of thumb, the market analyst should have access to a core of general periodicals; examples include:

- *The Progressive Grocer* —a monthly magazine focused at the supermarket sector in North America and regularly reporting food product sales trends.

- *Food Engineering* —a monthly magazine directed to the food processor, providing an annual review of new product introductions on retail and food service markets.

- *Prepared Foods* and *New Product News* —monthly papers that are produced by the same publishing house (Gorman) and provide detailed information on new food products in North America, Europe and other developed countries.

Table 6A. Food product categories with highest number of new product introductions, 1988.

Food Category	Total Introductions	of which: New Brand	Other*
Meals and entrees	140	43	97
Ice cream and cones	135	39	96
Other sources	131	38	93
Cookies	130	38	92
Bread & bread products	128	41	87
Spices, seasoning, etc.	127	47	80
Fruit/fruit-flavored beverages	120	28	92
Vegetables	98	23	75
Pastry & baked products	95	23	72
Chips	95	23	72
Chocolate candies	90	28	62
Cereals	90	9	81
Miscellaneous soft drinks	89	19	79
Meat	83	20	83
Meat meals and entrees	82	23	59
Non-chocolate candies	79	20	59
Other snacks	77	17	60
Cheese	73	19	54
Wine and wine coolers	83	15	48
Beer and ale	83	14	49
Pasta products/combos	60	12	48
Pastry	59	10	49
Salad dressing	59	11	48
Tea	53	15	38
Crackers	51	9	42
All items	3,440	884	2,556

Information on a comprehensive range of food categories is presented in Annex A.

* Includes line extensions within a brand, new packaging, improved formulations, new sizes, etc.

Source: Productscan, Marketing Intelligence Service, Naples, NY, USA, 1990.

Table 6B. Food product categories with highest number of new product introductions, 1989.

Food Category	Total Introductions	of which: New Brand	Other*
Cookies	158	54	104
Meals and entrees	148	53	95
Bread and bread products	136	37	99
Ice cream and cones	136	52	84
Cereals	132	25	107
Other sauces	117	41	76
Chocolate candies	114	39	75
Other snacks	105	34	71
Spices, seasonings, etc.	102	34	68
Fruit/fruit-flavored beverages	98	26	72
Pastry and baked products	96	27	69
Chips	96	32	64
Vegetables	87	24	83
Miscellaneous beverages	64	54	30
Cheese	82	33	49
Non-chocolate candies	81	21	60
Coffee	69	31	38
Soup	61	20	41
Crackers	58	12	46
Popcorn	57	25	32
Beer and ale	57	25	32
Meat	55	25	30
Pasta products	55	20	35
Salad dressing	52	10	42
Special diet foods	51	12	39
Fish	50	13	37
All items	3477	1,132	2,345

Information on a comprehensive range of food categories is presented in Annex A.

* Includes line extensions with in a brand, new packaging, improved formulations, new sizes, etc.

Source: Productscan, Marketing Intelligence Service, Naples, NY, USA, 1990.

- Calendars of events for the coming year (trade shows, trade association meetings, etc.) that are published by individual trade associations, some chambers of commerce, and relevant agencies of government that are in the business of facilitating private sector market development.

- *Food Service and Hospitality* and *Restaurants and Institutions*—trade magazines that focus on the food service business in North America; and the National Restaurant Association trade magazine that regularly reports research results on consumer "eating-out behaviour" through its CREST surveys.

The analyst should also review periodicals that target the specific subsector of the food or non-food business that is of particular interest. For example, if we want to track essential oil markets, the weekly *Chemical Marketing Report* and the technically-inclined *Perfumer and Flavorist* would be key trade papers. Advice should be sought from trade association staff and marketing management from firms actually in the business to ascertain the most appropriate mix of publications for review. (In Annex C, a list of trade associations active in the North American food industry is presented.) One note of warning regarding the veracity of trade magazine prognostications on market matters: typically, the trade press has a short-term perspective on new product development. Perhaps not surprisingly, surprising and unusual findings are played up to stir readers' interests, whereas more rigorous market analysis may reveal a less exciting but more accurate picture.

Frequently, government statistics are insufficiently disaggregated to be of major use to the marketing manager, although trends in per capita disappearance of food commodities provide a reliable post hoc means of confirming trends deduced from trade data (e.g., USDA and Statistics Canada/Agriculture Canada data is useful in tracking the recent growth in consumption of items such as "white" meats, some fresh produce items and declines in consumption for "red" meats and some processed fruits and vegetables). Further, at the four digit S.I.T.C. level, import and export statistics may be sufficiently disaggregated to provide useful market information on both volumes and values of items for which demand is expanding; providing access to, for example, information on which countries are taking advantage of expanding market opportunities in what countries, or data drawn for "user pay" services such as the OAS Foreign Trade Information Service (SICE), which has the capability to access information at the micro-level (e.g. U.S. Import Maritime Bills of Lading).

Identifying market opportunities is much more than simply interpreting the quantitative data published by pertinent trade and government agencies. The analyst must develop a thorough understanding of the underlying trends that drive market change. This is gained by continued contact with the market place (consumer, retailers, wholesalers, manufacturers, trade press and industry pundits) and subsequent synthesis of relevant and timely information on key variables. For example, in the Deloitte & Touche Pilot Phase Report, it was identified that important "consumer pull" and "technology push" factors influence the shape and nature of new food products being introduced onto the North American market. For example:

- Freshness —real and perceived— a complex concept in the mind of the consumer (a processed product can meet the required freshness criteria if it is perceived to be made from "fresh" ingredients).
- Convenience —easy to prepare, portable, accessible.
- "Light" —means ingredients excluded (fat, caffeine, sodium, sugar-related products).
- Nutrition —means ingredients added (vitamin-fortified, whole wheat, natural bran, pack in fruit juice).
- Quality —increasingly higher expectations (chilled main course meals are displacing frozen dinners as convenience products that have a "fresh meal" taste).
- Seeking change —consumers expect and look forward to experimenting with a vast array of new food products. Product life cycles of many food products are becoming increasingly shorter.
- Indicator of social status —the food the consumer eats is increasingly perceived as a means of labelling him or her socially and

professionally, and of claiming identification with a particular life-style group.

- Eating "on-the-run" —the proportion of meals that are not consumed in a traditional setting (e.g., characterized as the "knife and fork plus serviette family lunch") is growing quickly, requiring a wide range of food products that have all the attributes of traditional food stuffs (taste, nutrition), but can be hand-carried and eaten while doing something else (working, playing). One important filter in winnowing the high priority opportunities is to check that seemingly "high-flying" products are consonant with some or all of these primary trends.

Identify Expanding Demand Categories for LAC Products Focused at the LAC Community in North America

Such is the size of the various Latin American and Caribbean ethnic markets in North America that it is necessary to focus specifically on these markets, because their particular product needs and wants are swamped by the overall national picture; LAC agribusinesses have a comparative advantage in satisfying the very specific "wants" of these market segments. While there is a distinct paucity of public sector information on these markets, they are large enough to stimulate publishing companies to launch trade papers on, for example "Mexican American" grocery business and on Spanish-language food processing, wholesaling and retailing matters. A relative small-scale firm in, say, Costa Rica would consider the 10 million-plus Spanish-speaking, Latin American cultural groups in the U.S. as a market well worth investigating, even though it makes up less than 10 percent of the total national market. Information is available on product opportunities in these parochial markets from the trade press. Very likely, the distribution channels that service these markets will be specialized and not "mainline" wholesale buying groups such as Super Valu and Fleming Corporation in the U.S., who service so much of the retail and hotel and restaurant trade in North America.

Specific listings of importers and other merchandisers specializing in Latin American and Caribbean foods are available —for example in the Thomas Food Industry Register, published annually.

Identify Target Market(s) for Expanding Demand in Food and Non-Food Products

Taking specific note of LAC consumer market segments in North America serves to introduce the more general area of target market identification. Successful products do not satisfy the wants of an amorphous market, but rather are designed to satisfy the very specific requirements of particular market segments. Markets can be segmented in many and various ways (a prospect that is commercially exciting in that it can generate a wealth of market opportunities; at the same time, it complicates target market identification for the individual business). These include:

- **Geographic** —where in the North American continent are the cities/regions/states/ provinces with the highest concentration of potential product purchases? Commercial market research services such as the SAMI Category Development Index, SAMI/Burke Research Inc., Nielsen, and others provide basic product information in this area. For example, a product focused at Cuban Americans would be launched, most likely, in southern Florida.

- **Demographic** —segmenting consumers by age, life-cycle stage, sex, income, etc. In Canada, *The Financial Post Information Service* publishes annual reports on: consumer buying power, retail sales by province, economic region and census division; projections of population, household income and sales for the next five-year period; and detailed demographic breakdowns of each urban market in Canada (including population, age structure, marital status, mother tongue, housing type, income, level of schooling, labor force, occupation, lifestyles, weekly earnings, household expenditures, vital statistics).

- **Psychographic** —segmenting consumers by social class, lifestyle, and personality.

- **Behaviorial** —segmenting consumers according to the occasion or situation in which they use the product, the benefits they seek in the product, how they use it, and frequency of use of the product,

product loyalty status, readiness to buy, the types of shoppers, and others.

The Coca-Cola retailing research council has identified six distinct groups of supermarket consumers:

- **Avid Shoppers** –the active cook/shopper/bargain-seekers who have traditionally been the supermarket's core customers.
- **Hurried Shoppers** –busy shoppers looking for short cuts in shopping and cooking.
- **Unfettered Shoppers** –mostly older consumers with "empty nests" and considerable disposable income but with less need to shop carefully for food.
- **Kitchen Strangers** –sophisticated, childless consumers who are more likely to rely on restaurants than supermarkets.
- **Kitchen Birds** –older consumers who eat lightly and are spartan shoppers.
- **Constrained Shoppers** –unsophisticated, undereducated consumers with very limited income.

Product usage information can be accessed from commercial sources and usage rates can be cross-tabulated by demographic, geographic and other variables (annually, Simmons Market Research Bureau of NYC publishes product usage data for the major food categories in "The Progressive Grocer" trade magazine, as does Nielsen on national food advertising expenditures, and SAMI/Burke on the seasonality of product purchases through supermarket outlets).

No one means of market segmentation is exclusive; each provide an opportunity to identify the type of customer that would be most attracted to a particular product –the more detailed the consumer profile that can be established, the more accurately the product wants of that prime target group can be defined. For example, market research shows that the typical profile of the frequent purchaser of "low fat" yogurt is female, young

(18-25 years old), urban, concerned about calorie level intake, and is prone to "eat on the run." Although only representing 10 percent of all "low fat" yogurt users, this group may account for 80 percent of total purchases. The relative importance of this consumer group in this product market is illustrated by the plethora of yogurt advertisements that appear in magazines focused at the 18-25 years old female age group. Of course, there is a limit to target market definition, especially at the point where the target market is impossible to access or so small in buying power that it is not commercially worthwhile to make the contact.

Arguably, the most important market segmentation decisions that a would-be exporter has to make are: whether to target markets with a product in finished or semi-finished form (as a fully packaged product destined for the supermarket shelves or as a processed product for inclusion as an ingredient in a product that will be "finished" by a North American manufacturer); whether to focus on the retail consumer level, hotel and restaurant level, or institutional (military, hospitals, schools, etc.) level; and whether to seek a customer base that is in the food or non-food business.

If the LAC firm identifies the retail consumer as the best target area, it would be most likely that the product would be directed, initially, to the target consumer via ethnic retail outlets and specialty food stores and not through the major supermarket chains. For most smaller-scale firms, the cost of launching a product at the national or regional level via the supermarket sector is simply prohibitive, and the risks of product failure are very high. Also, supermarket chains wish to see a track record of sales success —whether it be in the food service, ethnic or specialty markets— prior to allocating shelf-space for new items. Distanced geographically and culturally from the market, the most perspicacious investment decision for many LAC firms may be to provide a processed product as a key input in the product formulation of a North American-based manufacturing firm (a firm with strong financial resources, an established product line, knowledge of and experience with the final consumer and trade members).

Market opportunities for non-food products that have ingredients made from "natural" raw materials have expanded rapidly in recent years in response to consumer concerns and demands for "freshness" and "naturalness" in products as diverse as floor polish, diapers, cosmetics and dog biscuits. Tracking sales of non-food products that have "natural" agriculturally-based ingredients is more difficult than for the equivalent products in the food trade. For example, there has been substantial growth in the number of skin care products, shampoos, and even drinks that claim to have aloe vera as an ingredient, yet world acreage of aloe vera has been relatively stable over the past decade. Tracking aloe vera usage would require monitoring product sales in a host of different industry subsectors and, invariably, the required level of detailed information would not be available. If relevant market data are available, then the trade press provides the best source of market information on new product developments and opportunities, albeit of a qualitative nature.

For industrial marketing (i.e., for products that are used by firms in the production of a final fully processed product), the major market variables do not differ substantially from those for consumer markets (geographic, or behaviorial variables such as "benefits sought," user status, usage rate, loyalty status, readiness stage, attitudes, etc.). However, useful industrial market segmentation variables also include: end use ("quality up-market" or mass market); customer size (a large firm such as Unilever or a small-scale family firm); and product application (finished good versus raw material). A wide range of factors influence the buying behavior of industrial buyers who, for simplicity's sake, can be categorized as environmental, organizational, interpersonal, and individual (Table 7).

Evaluate Supply-side Considerations that Affect Market Opportunity Development

In a hypothetical marketing context, the firm identifies the market opportunity with the greatest potential and takes action accordingly. In practice, and at the individual firm level, many and various factors unrelated to the market constrain market opportunity exploitation. Firms tend to focus on export opportunities that reflect product areas that they know well or, at least, are within their area of competence; for example, it would be pointless to strive to satisfy a market opportunity which has an insurmountable technological barrier or required financial and/or managerial resources in excess of the firm's capability. The better firms do not perceive themselves as producers of particular products, but rather as being able to satisfy customer wants at a profit though offering a capability

Table 7. Major factors that influence the purchasing decision of industrial buyers.

Environmental	Organizational	Inter-personal	Individual
Level of demand	Objectives	Authority	Age
Economic outlook	Policies	Status	Education
Cost of money	Procedures	Empathy	Job Position
Rate of technological change	Organizational Structures	Persuasiveness	Personality
Political and regulatory developments	Systems		Risk Attitudes
Competitive development			

Source: Webster, F.E. and Wind Y., Organizational Buying Behaviour, Prentice-Hall, 1972.

to supply finished products and/or ingredients for further processing. Thus, an important filter when evaluating export market opportunities is to canvass the views of present and potential exporters and objective experts who know the reality of the market place and the supply capability of the country concerned to ascertain what types of export opportunities are attainable.

The view that the individual firm has on export market opportunities will reflect, inter alia, information elicited from its own research efforts, intuitive "feel" on market prospects and, too often, blind and, generally, misguided faith in the market worth of its products ("sells well in San José, so it should do well in Miami" syndrome). Market-side questions that should be answered include:

- Who constitutes the market?
- What does the market buy?
- Why does the market buy?
- Who participates in buying?
- How does the market buy?
- When and where does the market buy?

Other important pragmatic factors for evaluation include: market potential in North America for unique local products (e.g., a processed product from a fruit not grown elsewhere and which may appeal to an ethnic niche market or to specialty food store clientele); supply availability vis-à-vis North American supply season (e.g., refrigerated fresh juices that have a limited storage life may be available from the potential exporting country in a season in which they cannot be produced, or "counter seasonal" in the market side country; past and projected performance of traditional sources of supply for key products (citrus juice products from Florida being displaced by Brazilian products as Florida agricultural land changes use to housing and leisure parks; climatic changes that have increased the probability of frost, thereby precluding commercial aloe vera production in Texas with the Dominican Republic picking up the "supply slack"); and, importantly, a realistic assessment of whether the firm's own resources —raw material supply, financial, technical, management, marketing— are adequate to meet the rigorous needs of the projected export task.

If an embarrassment of market opportunities is evident, then public sector agencies interested in export market development may apply another set of filters to reduce the number to manageable proportions, including:

- Preference for labor-intensive over capital intensive;
- Maximization of in-country value added;
- Maximization of net foreign exchange earnings;
- Fostering regional development; and
- Encouraging non-traditional exports.

Such economic factors are of minimal concern to the individual firm which has other objectives and requirements (making a profit, establishing a foothold in the market), although both could be the central tenets of a public sector export development policy.

Next, the export analyst should review the product opportunity list to ascertain if there are sensitive requirements of a particular product's export program that are unlikely to be met because of supply-side constraints. For example, and at the most obvious level, if the export product is perishable —a refrigerated, fresh tropical juice, say— then regular, reliable transport to export point would be a sine qua non. Or the supply country could have an outright ban on the export of the product to maintain a strategic national food reserve. Or —often the case— government policies and programs that hinder acquisition of foreign exchange to purchase essential inputs (e.g., special packaging material) in the manufacture of the export product.

At this stage, the market analyst has identified a range of market opportunities with a strong market-side perspective, added to and tempered by the supply-side view of the export market and the realities of the supply environment. Now, let us return to market factors.

Evaluate Barriers to Entry in the Importing Country for Products with High Potential

a. Government Barriers

Government-erected barriers for LAC exports to North America can be tariffs, quotas, outright bans on certain imports, animal and plant product inspection requirements, processing plant inspection, packaging and labelling regulations, and many others. The good news is that, as a result of tariff reductions/eliminations emanating from programs such as the CIB and CaribCan, tariff levels (whether absolute or ad valorem) are zero or at very low rates for many LAC agriculturally-based products. The bad news, however, is that tariff levels are really just a minor impediment to export market entry; **non-tariff barriers** are the hurdles that trip up LAC export trade:

- **Quotas:** can be both formal and informal. For example, at the informal level, the USA has a "friendly" agreement on manufacturing quality beef with major importing countries. If import volumes reach a certain ceiling, the implicit threat is that the US government will impose quantitative restrictions on imports (this is contrary to established GATT agreements). The "right" to import for the individual firm is established by the trade authorities of the exporting country, who allocate export quotas based on the historical level of imports for each importer –hardly an appropriate basis for the new market entrant. Importation of agriculturally –based products that are in the supply management sector in Canada (e.g., dairy products, any product from broilers, turkeys and eggs) are very strictly controlled. In brief, imports may enter these commodity areas when and if there is a shortage of domestically-produced products; again, this is an unpredictable and arbitrary market entry basis for any new exporter, one that would severely reduce the ability of any firm to launch a coherent export program for products that compete with supply-managed commodities in Canada.

Historically, the farm lobby in both the USA and Canada has had significant political power; a concerted lobbying effort has reduced or removed the competitive threat from imported products. The dairy, sugar, cotton and tobacco sub-sectors have been particularly successful in keeping out competitive products. This is not to say that a potential exporter of an exciting new dairy-based product should exclude North America as a market, but the exporter should be aware that there are considerable hurdles erected to impede market entry. Among them:

- **Health regulations**: In the USA, the FDA and the USDA and, in Canada, Health and Welfare Canada and Agriculture Canada are the federal agencies that regulate the quality of imported foodstuffs (the goals being consumer protection and control of diseases that may harm domestic agriculture). As a general rule, the greater the value added to the product at point of production/manufacture, the more stringent are the requirements that must be met by the would-be exporter. For example, while a factory producing a relatively simple item like chili peppers in brine has to meet certain product tolerances, it does not require FDA certification of the plant itself (although inspection of the plant is a prerogative of the FDA which may be exercised). For a product requiring more sophisticated processing, the plant must meet FDA standards and will be inspected by employees of the agency prior to undertaking regular export shipments. The specifications that must be met to satisfy requirements for importing meat products into the U.S., for example, are very stringent; perusal of the description of plans and specifications that must accompany applications for abattoir inspection by USDA are enough to deter all but the most committed meat exporters.

- **Packaging and labelling regulations:** In both Canada and the USA, there are stringent regulations, generally put in place for good reasons, governing the packaging and labelling of food products; these make it more difficult for LAC exporters to penetrate North American markets. In the USA, the requirement to identify detailed nutritional information adds significant cost for the would-be exporter of a new and/or low volume product. In Canada, the requirement for bilingual labelling complicates the export process.

b. Private Trade Barriers

The notion that a firm can simply ship a product that may have market potential to a distant export market expecting that it will find its way to the final consumer is one that is still held by some misguided businesses. It is an anachronism from the days of commodity marketing as opposed to current merchandising practices of targeting custom-designed products for differentiated markets. In reality, there are a host of barriers to market entry constructed by the private trade in the export market. They include:

- It is difficult to sell the services, processing capability and products of a firm in the absence of proven experience in a successful previous export programme, i.e., the "Catch 22" syndrome exists- it is difficult to get into the export business unless you are already successful in the export business.

- As identified earlier, the high levels of resources required (technical, managerial, financial) to launch a finished product on the North American retail market preclude many smaller-scale firms in the LAC region from taking this direct route to the consumer.

- The markets for some product categories are dominated by few, typically very large suppliers, ensuring that market entry for the new exporter will be a very expensive process. These are the markets that are characterized by internationally-known brand names established over many years; often, the brand names become the generic names for the products in the category (e.g., "Coke" for any cola, "Tabasco" and "Lea and Perrins" for any Bloody Mary mixers, "Hershey Bar" for any chocolate bar, "Clorox" for any bleaching agent). These types of markets are difficult for the new entrant to penetrate. Indeed, the extent of the difficulty is illustrated in Table 8; all the products listed were shown to exhibit very strong consumer loyalty to an exclusive brand. For example, more than half the households surveyed had bought grated cheese in the previous month and three-quarters of these households were consistent purchasers of one brand only (the appearance of table salt and vinegar high on this list –two commodities that one would not expect to find strong brand loyalties– reflects the dominance of supermarkets' own brands for these staple items). Further, the large-scale companies dominate the lists of the most frequent product marketers, and are slowly increasing their share of total new

Table 8. Food product categories characterized by strong consumer brand loyalty.

Food Product category	Percent sample using or buying	Exclusive one-brand users (%)
Shortening	66	92
Isotonic drinks	17	89
Egg substitutes	5	86
Fruit-flavored powdered drinks	14	84
Dried milk	28	81
Table salt	96	81
Vinegar	86	81
Sauerkraut	24	79
Donuts	22	79
Dinner rolls	57	77
Grated cheese	56	77
Nutri-based supplement	8	77
Non-dairy creamers	24	75
Cocktail mixes	8	74
Non-stick cooking oil spray	39	73
Butter/margarine blends	45	72
Croissants	25	72
Candied popcorn	15	72
Yogurt	11	72
Flavoured iced-tea mix	6	72
Marshmallows	63	71
Corn-on-the-cob (frozen)	28	70

Source: Simmons Market Research Bureau, Consumer Survey, 1987, USA.

product introductions in the food and beverage industries (from 18 percent of total in 1987 to 23 percent in 1989).

Even at the "top end" of some commodity markets (e.g., for fine-flavored cocoa, long-staple-length cottons), where internationally-accepted grades are established, there will be a minimum shipment size that will attract the interest of the bona fide broker community —arriving at this critical export mass may prove an insurmountable obstacle for the small-scale would-be exporter.

- The increasing sophistication of processing and packaging technology for food and other products in North America can act as a barrier for the new market entrant from LAC, particularly in finished product market areas. This provokes the conclusion that the best means of market entry and/or accessing new technology is not so much to "beat them" but to "join them"; "them" being North American firms and "joining them" suggesting the establish-ment of some type of joint venture agreement.

Identify Processing Technologies that are Consonant both with Final Product Market Requirements and Supply-side Technological Capability

In the first component of this research program, 20 specific processing technologies were short-listed as "promising" for LAC region food processors interested in exporting to North America (Table 9).

Table 9. Short list of promising technologies for LAC region food processing businesses.

Processing area	Specific processing technologies
Packaging	Aseptic Packaging Modified Atmosphere Packaging Vacuum-Cooking Technology
Drying	Freeze-Drying Technology
Concentration	Membrane Processing
Irradiation	Gamma and Electron Beam Technology
Texturization	Surimi Processing Extension-Technology Restructured Meat Technology Micro-encapsulation Technology
Extraction	Essential Oils Vegetable Protein Technology Natural Food Color Extraction Citrus and Apple Pomace Technology Super Critical Processing
Fermentation	Flavors and Aromas Enzyme Production Yeast Production Lactose Hydrolysis Monosodium Glutamate

Source: IICA Marketing and Agro-Industry Study, Pilot Phase Report, p.3.1., Deloitte & Samson, May 1989.

Assess Relative Profitability of Products Short-listed as Showing Strong Market Potential

The marketing function in any business comprises two basic tenets: satisfying customer requirements with products or services, and doing so at a profit. The final criterion in deciding which of the short-listed products offer the greatest market potential is to gauge the relative profitability of the export product alternatives. Needless to say, the rank assigned to each of the short-listed items will vary between firms and countries, reflecting relative competitive strengths and weaknesses. The operative word in this "thumb nail" analysis is gauge, i.e., a comprehensive financial analysis of the export market opportunities is not required at this stage and will not be required until the firm is substantially more sure of the reality of the export market opportunity. However, the analysis can provide broad estimates of CIF values and ex-plant costs to give guidelines on the relative profitability of the short-listed alternatives.

Summary of Major Steps In Marketing Opportunity Identification

In Table 1, a summary is provided of the major steps in identifying marketing opportunities with high potential for LAC firms. It is important to recognize that identifying export market opportunities is not a "push button" exercise –it requires market opportunities, and, not least, versatility, flexibility, resilience, persistence and hard work. North American markets for food and non-food products are vast –around 300 million consumers with nearly the highest per capita income in the world. Seemingly driven by a messianic desire "to shop," the North American consumer has innumerable choices. The "winning" products are those that best satisfy the complicated "wants" of the consumer. It is saiutary to remember that most new products fail to establish themselves in the market; for both the shopper and the exporter, there is no free lunch –they both have to earn it!

3. A REVIEW OF HIGH-POTENTIAL PRODUCTS FOR LAC FIRMS IN NORTH AMERICAN MARKETS

Introduction

So as to structure on the discussion of high potential products for LAC firms in North American markets (an imposition that is necessary given that the huge market is home for a myriad of products), the product categorization used by the North American food retail industry is used in this section. However, reflecting that the "client" for this section is the LAC food manufacturer who does not view the product world as per the U.S. retailer, the categories are not followed slavishly and ample note is taken of multiple categories that can comprise the relevant sub-markets for a potential ingredient (e.g., a dried fruit product can appear "dried fruit", "breakfast foods," "snacks," "desserts and toppings"). But, first, a brief overview of the market for fragrance and flavor products is presented to show how this vast market area fits in with the retail and food service markets for food and non-food products. Secondly, promising product categories and promising products within each category are assessed in terms of North American market potential. The final part of the section summarizes the high potential products on their relative strengths vis-à-vis ten key criteria that influence the level of consumer acceptance in the North American marketplace.

Flavors and Fragrances

Trade sources estimate that the world market for flavors and fragrances increased from US$6.6 billion in 1988; after adjusting for inflation, a 6% real annual growth was experienced in the decade of the 1980's.

The fragrance market has two major sectors: cosmetics and toiletries (including perfumes), and cleaning products (soaps, detergents and other household products). The concentration of fragrances in finished products may only be a fraction of one percent but their inclusion in a product has increasingly become essential in any successful marketing mix. However, the fragrance product must be resilient because, for cleaning products in particular, it must be stable in a harsh environment (soap fragrances must last as long as the bar of soap, in damp conditions, while withstanding immersion in hot or cold water). Types of fragrances used depend on the product being considered: for example, classical perfume fine fragrances are often used in soaps aimed at women (with 2-3 percent fragrance content), whereas herbal, spicy or wood fragrances are more popular for men (in concentrations of 0.75 to 1 percent). In most domestic cleaning products, "fresh" and "clean" smells are desirable and lemon, pine, citrus, lavender and violet perfumes are used.

The market for flavors covers a wide range of consumable products and extends beyond the food and beverage industry to pharmaceutical, animal foods and tobacco. The major flavor product categories are:

- chocolate and sugar confectionary;
- soft drinks;

- alcoholic drinks –liqueurs and aperitifs;
- dairy products –yogurt, dairy desserts, ice cream, margarine and other spreads;
- savoury foods –chips and snacks, canned foods, meat products;
- frozen foods –pre-cooked meats, frozen desserts;
- pharmaceuticals; and
- animal foods –animal feed stuffs, pet foods.

Several of the food "megatrends" that have become manifest through the 1980's serve to explain the strong growth in demand for fragrances and flavorings (consumer concerns about healthy eating, nutrition, and "quality" food). It is important for food and non-food manufacturers to produce products that have "natural" ingredients, with a particular consumer preference expressed for natural colorants and flavorings (rather than the much maligned and frequently misunderstood "E" numbered ingredients). With the exception of the category "alcoholic drinks," the major product categories that encompass the heavy usage areas for fragrances and flavoring have generally seen significant market growth over the past 10 years (as measured by real growth in retail sales and rate of new product introductions). High potential areas for flavors and fragrances include fruit and vegetable extracts, pulped/juiced fruits, extracts of herbs and spices –ingredients which all support finished product claims such as "all natural" and/or "no artificial additives."

Trade sources estimate that, while there are more than 1000 manufacturers of flavors and fragrances worldwide, 15 multinational companies account for 50 percent or more of the US$ 6.6 billion market and the trend to industry concentration is continuing. The rationalization of firms within the industry reflects the high cost of toxicological testing, R & D, quality control and manufacturing. The conventional trade view is that smaller scale firms with niche markets developed through applications of specialist knowledge may survive, but, overall, the trend will continue to favor and larger units. The major firms of the world fragrance and flavoring industry all have manufacturing facilities and/or offices in North America:

- IFF
- Quest International
- Givaudan
- Haarman & Reimer
- Firmenich
- Florasynth
- Takasago (Japan)
- Dragoco
- Roure
- BBA
- PFW
- FD&O
- Felton Worldwide

The difference between the top and bottom of the list –in terms of sales– is large. In 1987, for example, IFF's turnover was US$746 million while that of Felton was US$75 million. Needless to say, it would be commercially foolhardy to try and compete head-to-head with these major companies; it would be better to develop a preferential relationship based on supplying them with a quality product that was manifestly superior than that available from competitors.

In the next section, high potential food product areas are identified for LAC firms in the North American market. The market opportunities are not only for the finished products per se, but also for the ingredients that comprise the elements of the finished product, of which flavors and fragrances are an important ingredient category.

Dried Fruits

The dried fruits category had a banner five-year period in the second half of the 1980's, largely led by burgeoning demand for dried prunes and raisins (two items that account for more than 50 percent of sales in this half-billion dollar category) which were products that met the health aspiration of an increasingly nutrition-conscious buying public. Outside these two product areas, there are distinct windows of market opportunity for LAC firms:

- Relatively unprocessed dried fruit products –destined for sale to the health-conscious, concerned-about-nutrition consumer seeking a snack product that is quick and easy to eat and that accords some status with the peer group because of its exotic nature. "Sun-dried" papaya, mango, pineapple, carambola in their natural, not sugared form, are exotic "trail mix" items that have cachet with the middle-class, active/out-of-doors consuming group.

- Tropical fruit leathers –focused at the better-educated middle–class mother seeking a school lunch/snack product that has the attributes of the "unprocessed" dried fruit but the attractiveness required to get children to accept, eat and enjoy the product. For the LAC manufacturer, the product ingredient is a fruit pulp or paste that could include the fruits identified above plus guava and Barbados cherry (acerola).

- Tropical dried fruit "bits" –for inclusion, in particular, in breakfast food such as toaster pastries, hot and ready-to-eat cereals. In recent years, consumer health concerns have spawned a proliferation of oat bran ready-to-eat cereals (in 1989, 282 new products were introduced on the basis of "oat bran added", of which half were targeted at the breakfast market). Concern about fiber content of food has been paramount, yet bran per se is an unequivocally dull food. Market opportunities are strong for natural exotic fruit additives to high fiber breakfast cereals; if any strong claim on fibre content for the fruit can be made, so much the better (the high fiber content of prunes has caused the market to strengthen substantially for this traditional product, particularly from consumers in the 45+ age group).

- In addition, markets are opening for "unusual" grains and pulses that have bona fide health claims. Psyllium, an Indian subcontinent grain which ostensibly has cholesterol-reducing properties offered strong potential in the premium end of the breakfast product market patronized by well-educated younger, high-income consumers in 1988, but the health claims were unsubstantiated and the product sank from view in 1989. Dried lentil, pea and bean sales ($100 million in 1989; increased by more than 12% in 1988 and 1989), reflecting the high fiber content of these items which prompted strong purchasing by the Hispanic consumer (pulses are regularly purchased by these consumers). Certainly, there are strong market opportunities for exotic pulses, particularly those that look different from the run-of-the-mill peas and beans or have unusual characteristics of properties. For example, nuna beans are grown at high elevations in the Andes and have the characteristic of "popping" when heated rapidly, suggesting that, potentially, a market exists for an exotic "popbean" snack.

Pre-prepared Entrées

One striking trend in new product introductions over the past five years has been the rate of growth in meal entrées: pre-prepared multi-ingredient meals that, after heating, are ready to eat. The trend is a result of the manufacturers' response to consumer demands for more convenience, coupled with the advent of the microwave age and technological advances that have substantially increased the quality of pre-prepared meal products. In 1989, close to 10% of new food products were meal entrées –of which half were frozen, one-third in shelf-stable packs and the remainder refrigerated but not frozen (incidentally, a mix that covers three distinct supermarket food categories); all these new products were "microwaveable." New products on the leading edge are: low-calorie entrées for the weight-conscious; entrées that are aimed specifically at children, such that children with both parents working away from the home can prepare their own major meal of the day by simply operating the microwave oven; and "lite" international entrées that allow consumers to try exotic ethnic meals at home rather than in the restaurant.

The market opportunities for LAC firms in this product sector are largely for ingredients that are included to make the final retail product. Spices and flavoring agents that are characteristic of popular ethnic meals are examples. But, increasingly, manufacturers will wish to claim that the entrée ingredients are "fresh" or, at least, to use the oxymoron that has entered the vernacular of the food trade, "fresh frozen." Individually quick frozen (IQF) mini-vegetables and frozen (rather than dried) herbs and spices such as cilantro/coriander (for Latin American and Asian food dishes) will be ingredients in strong demand by North American food manufacturers.

Delicatessen Items

A wide range of food products are sold via the deli counter, with "cold cuts" (precooked, sliced meats) and cheeses predominating, but with hot and cold full meal and snack items expanding in sale importance.

Approximately 70% of all supermarkets in North America operate a "deli" within the store. In the past several years, deli sales growth has outstripped supermarket sales in general (deli sales were about US$7 billion in 1989, 2.7 percent of total supermarket sales). The sales growth has been fuelled by the sharp increase in the number of pre-prepared meal items (which account for more than 20 percent of deli sales), a trend discussed earlier in this section. Some major chains have even established a food service outlet within the store; for example, Safeway Stores in northern California have in-store Chinese food "take-out" counters that are distinct from the deli counter. However, the pre-prepared deli items with the most potential are cold items, including:

- cold entrées that can be micro-waved for immediate consumption as hot meals back at home;
- traditional, nouveau and exotic salads;
- "ready-to-heat" gourmet soups.

While some supermarkets opt to prepare their own food service deli items, increasingly specialist food service companies are the principal deli product suppliers (e.g., Orval Kent Signature Salads, EX Cuisine of Blue Ridge Farms, and the Quality Food Service Division of Campbell Foods).

As for the previous product category, the opportunities for LAC agroindustrial firms in the deli foods sector of the marketplace stem from the increasingly international character of the pre-prepared food items with the specific market opportunities being for "exotic" ingredients such as:

- "fresh frozen" herbs such as cilantro (coriander), oregano, and marjoram;
- pre-prepared salsa products, with unique combinations of herbs, spices and seasonings, for meat and fish dishes;
- high-value processed fish products of the surimi type (e.g., shrimp cakes, crab backs);
- fruit chunks, preserved in their own juice, for inclusion in tropical fruit salads;
- unusual fresh vegetables (e.g., Andean blue potatoes) for inclusion in tropical vegetable salads;
- finally, greater value-added opportunities may exist for the LAC firm that focuses on product opportunities in the USA, Caribbean and Hispanic consumer niche markets. For example, merchandising pre-prepared entrées and snacks that are unique to certain LAC national groups through supermarket chains and food service outlets that have a large Spanish-speaking clientele (XTRA Super Food Centres in southern Florida, for example, have a strong retail profile in the state and 70% or more of its customers have a Latin American ethnic background).

Notwithstanding the interesting market prospects that emanate from the growth in demand for pre-prepared deli meal items, the mainstay of deli sales are cold, processed meats (accounting for around 40 percent of product sales in the deli category). Surmounting the regulatory hurdles for meat items into the North American market requires considerable corporate resources; however, opportunities de exist for LAC meat processing firms. Initially, the best avenue is via the food service distribution network with a product such as traditional roast beef, sliced for the sandwich trade (preferably with a low salt, low fat claim —low fat being a justifiable claim for grass-fed Argentinian beef), packed in a gas-flushed, environmentally protected package (e.g., using the innovative "Cap Tech" technology) and shipped chilled (not frozen), with the product launch timing preferably in the quadrant of the North American beef cycle characterized by lower supplies and higher prices for beef products (to give the new market entrant a relatively high price base and time to establish a reputation for quality and reliability which can serve as a buffer when prices decline).

Sauces and Dressings

At the retail level, whereas the "sauces and dressings" product category accounts for less than 2 percent of total store sales, it has shown consistently high sales growth over the past five years, it accounts for more than US$4 billion in total sales, and the category consistently spawns a high rate of new product introductions. The category is a product "catch all", including ketchup, mayonnaise, salad dressings, spaghetti sauces, Mexican sauces, meat sauces, mustards, and hot sauces (the latter account only for 1 percent of category sales, but show a sales growth rate double the category average). From a LAC firm perspective, burgeoning marketing opportunities for flavorings and seasonings emanate from increasing consumer interest in new food experiences as personified by new/exotic sauces on traditional North American fare and new international dishes per se.

Pasta products are increasingly the carbohydrate "vehicle" for consuming traditional and exotic sauces both made in the home and pre-prepared. Per capita consumption of pasta in the USA doubled between 1972 and 1989 (from 8.6 lbs. to 17.7 lbs.). Factors that explain the expansion of pasta consumption in the USA include the growing consumer acceptance of "continental" dishes and that pasta –a product low in fat and a good source of complex carbohydrates– is perceived as a healthy and nutritious "filler."

Competition in the pasta product category in North America is intense, characterized by a high rate of new product introductions (Table 6), and is not a high-potential area for LAC firms. The market opportunities that do for LAC firms, however, are in providing ingredients and/or sauce bases for products that accompany pasta (side dishes, pasta and sauce mixes), product areas which increasingly are the province of major North American food manufacturing firms such as General Foods, Hershey, CPC International, and Kraft/RGR Nabisco.

Savoury Snacks

Savoury snacks –including chips, savoury popcorn, crackers, corn/tortilla chips, and others– accounted for more than 10% of new product introductions in 1989 and had supermarket sales alone of more than US$4 billion in that year. The addition of new flavors to existing snack products underpins the strong sales growth in this category, and thereby establishes an area of high potential market opportunities for LAC firms: providing natural spice and flavoring mixes to the snack manufacturing trade in North America. The North American consumer is the world's greatest snack consumer --eating snacks is an integral part of almost every social activity (watching sports, T.V.) and, while the consumer eats them because he/she likes them, knowing that snacks are generally less than healthy foods, absolutely any health or nutrition claim (such as "all natural ingredients," "no cholesterol," etc.) helps to assuage the nagging guilt associated with pervasive snacking!

A good start for a LAC firm seeking market opportunities in the snack and/or sauces and dressings sector of the North American food market is to identify local/regional/national flavors, sauces, processed products that have unique characteristics and are little known outside its domestic market and that support product claims of "naturalness," quality, "newness," and a cosmopolitan or exotic image. Product types might include:

- Trinidadian and Barbadian seasoning sauces (particularly for fish and chicken), with strong emphasis on processed fresh herbs and shallots.

- Jamaican "jerk" sauce products, in a mild form for the tentative consumer seeking a tasty, but not too spicy meal experience that will recall memories of past Caribbean holidays, as well as a "full strength" version for aficionados and those seeking to be acknowledged as cosmopolitan, epicurean risk-takers!

- Liquid hot sauce products from a range of LAC countries, each with characteristics that will appeal to a particular target group (that is, appealing specifically to the ethnic Mexican consumer through a unique flavor redolent of "home," and "easy-to-dispense" container that would appeal to the hotel and restaurant trade).

- The aforementioned "popbean" snack product.

Interestingly, retail sales of spices and extracts have barely kept up with the rate of sales growth in the supermarket sector as a whole in recent years (5.2% in the latter half of the 1980's). While this may appear surprising at a time when consumer interest in "exotic" eating in buoyant, it indicates that most North Americans do not know how to use spices and prefer that the food manufacturer include them in ready-prepared products rather than use them as ingredients themselves. Notwithstanding this relatively slow growth, over 100 new spice products were introduced in

1989 in a market dominated by some major manufacturers and packers (with McCormick & Co. the market leader). These observations underline the relative attractiveness of merchandising spice/herb mix ingredients to the North American food product manufacturers, rather than competing on the slow growth spice retail market that is characterized by strong competitive pressures from the dominant firms.

Juices and Fruit-Flavored Drinks

Retail sales of juice and fruit-flavored drinks in the USA exceeded US$7 billion in 1989. Of this total, more than half were from sales of juices from the "dry grocery" product category, i.e., tinned, bottled, or aseptically-packaged products that are not refrigerated; one-quarter were from sales of refrigerated, but not frozen, products in glass bottles, plastic containers, and waxed cartons; and one-quarter were juice products in frozen form, concentrated for subsequent dilution in the home. The juice category is dominated by orange, apple and, to a lesser extent, grapefruit and other citrus juices, grape and cranberry juices.

In this huge sales category, even a small market share can translate into substantial dollar volume sales for the minor product suppliers. For example, pineapple juice sales at retail exceed $80 million in North America (although, this is not a high growth rate juice product). On the "dry grocery" shelf, "other fruit juice" sales —which include the composite group of tropical fruit juices (mango, guava, passion fruit, "tropical punch")— grew by 21 percent in 1988 and 1989, four times the category growth rate and have total sales of close to US$300 million.

Further, in the premium refrigerated drinks market and in the premium bottled "dry grocery" component, products with tropical fruit juices as major ingredients are increasingly in evidence. For example:

- In the high per capita income Californian market area, products comprising blends of tropical juices (in particular, mango, guava, banana, pineapple supported by citrus and apple juices) are now consistently available in the refrigerated drinks section of all the major retail chains.

- The marketing arm of the cranberry producers' cooperative that dominates the cranberry juice component and other juice mixes including guava, passion fruit, papaya and other tropical fruit juices.

- Market growth for "specialty" juices has not been confined simply to exotic tropical items; there has been a marked expansion in sales of berry juice products, particularly raspberry, and to a lesser extent boysenberry and blackberry.

Sales growth in the "non-citrus juice" segment of the juice market was helped in the late 1980's by consumer concern about pesticide contamination of apple juice (the "alar" issue), although increasing consumer interest in "exotica" and willingness to try new products have been the major forces driving sales growth. Certainly at the retail level, there is increasing concentration of juice suppliers in this crowded market (including such corporate giants as Coca Cola, proctor and Gamble, and General Foods), making it difficult for the small-to-medium-scale processor to enter directly this component of the juice market.

Large as the sales of juice products are at retail, this category is dwarfed by saies of "soft drinks and mixes", which had sales of over $10 billion in 1989. This is the category that has international product groups such as "Coke," "Pepsi," "7-up," and "Sprite" as its major players. Perhaps surprisingly, there are growing market opportunities within this "mega-category" for the LAC agroindustrial firm --specifically, as a supplier of interesting, unusual juices to North American firms producing seltzer drinks mixed with real fruit juices. The target market consumer has been characterized by one trade member as the "tennis-playing sets;" a neat label to describe the young to middle-aged, middle-class consumer, concerned about health, nutrition and, not least, personal image, who would be embarrassed to be caught by his/her peer group with a bottle of "Diet Coke" in hand (and would consider "Cherry Coke" as an unequivocal indicator of lower social class!).

One example of a non-North American company that targeted the seltzer and juice product area with precision in recent years is the Australian firm that introduced a range of tropical juice products under the "Koala" label. Passion fruit, mango, guava juice mixed with seltzer were introduced with substantial success. Initially, the company supplied the entire product from Australia but, noting the degree of sales success, it quickly opened bottling outlets on the North American continent. While the higher volume end of this business may be for the better known tropical juice products, the market is so huge that substantial opportunities could exist in particular niche markets for juices relatively unknown in North America, such as naranjilla, sorrel, babaco, and guyabama.

Ice Cream, Yogurt, Desserts and Toppings

Close to 10% of new food products introduced into the North American market in 1989 were ice creams, yogurts, desserts and toppings (Table 6), notwithstanding the lack of congruity between these "forbidden fruits" and consumer concerns about fat, cholesterol, sugar, and fiber. Let no person come between the North American consumer and his or her dessert! In fact, manufacturers have responded to consumer wants for traditional desserts that have less fat, and cholesterol, and sales of iced milk and frozen yogurt products have increased markedly, whereas all but the premium end of the ice cream market has been relatively flat (per capita yogurt consumption, at 4.6 lbs. in 1989, was six times higher than it was in 1970). An indicator of the importance of this overall category and its recent rate of sales growth is that shelf-space "footage" provided to products in the ice cream category more than doubled between 1983 and 1988.

The market opportunities for LAC agro-industrial firms in this category are for flavorings, essences, juices and fruit purées and chunks of fruit items that are not grown in North America. The potential customers of the LAC firms include: the North American and international firms that produce flavors and essences for the food industry; juice, purée, nectar and fruit ingredient blenders and brokers; and the manufacturers of ice creams, yogurts, desserts and toppings themselves. The target market consumers of final products can be characterized as "baby boomers," now aging and seeking "light" dessert products that offer attributes such as "all natural fruit ingredients," "cosmopolitan and exotic taste," and "no artificial flavoring." The specific LAC products include those identified in the previous section (juices and fruit flavored drinks), plus others such as sour sop purée/nectars, tropical fruit chunks packed in natural juices, and even aloe products (with the health claim that aloe can reduce the risk of stomach ulcers). At the retail level, products such as "tropical fruit salad" have advanced significantly from the days of canned tropical fruit mixes dominated by pineapple. Now, innovative packaging, such as transparent plastic containers, merchandised refrigerated (but not frozen), have raised this product type from the institutional food level to the premium end of the dessert product market.

Interestingly, the growing consumer concern in some market categories to establish a defined image for the consumer through the food items he/she eats (eating little-known tropical products to establish that the consumer is cosmopolitan, well-educated, epicurean) may well open up market opportunities in the hitherto closed baby food product category. Not only do parents wish to enhance their image in the eyes of their peers, but they also want their infants to be perceived likewise! Again, tropical fruit purées and nectars can find and important niche market in this product area, as long as they are channelled through the principal manufacturing firms that have the confidence of the buying public (e.g., Heinz, Gerber, Beech-Nut, Nestlé/Carnation).

Specialty Beverages

Even within declining sales categories, there are distinct market opportunities for LAC firms --specialty coffees are a case in point. Retail sales of ground and whole bean coffee have shown no growth in recent years, and in Europe and North America, per capita coffee consumption has declined (the International Coffee Organization estimates that coffee drinkers have reduced consumption from 4.2 cups per day in 1962 to 3.3 cups in 1988). However, specialty coffees showed modest sales growth during the 1980's. Perhaps the best example of product differentiation for coffee is that shown by Jamaica's Blue Mountain coffee: in North America, the retail price for Blue Mountain coffee is generally above US$20 per lb. and US$8-10 per lb. higher than equivalent quality varieties. The Blue Mountain coffee crop is purchased virtually in its entirety by one Japanese buyer who has combined clever merchandising, building on the well-established consumer image of Blue Mountain coffee, with strict quality control and total supply control to create a high-margin niche in the specialty coffee market.

While retail sales of loose/bulk tea and tea bags have declined in recent years (loose tea sales fell by over 10 percent in 1988 compared with 1987), sales of specialty teas and herbal teas have shown sales growth greater than the store average (although only 2 percent of the coffee and tea sales category, specialty and herbal teas have combined sales of almost $100 million in North America). One U.S. company in the vanguard of market development for herbal teas is "Celestial Seasonings" (now owned by General Foods). It has focused on consumer concerns about health and targeted those consumers that consider caffeine-based drinks such as tea and coffee anathema. Herbal tea ingredients constitute a product area worth developing by LAC firms, particularly if a principal ingredient can be identified that has a strong sales story (e.g., Mayan/Inca historical linkages, traditional healing properties, etc.).

Per capita consumption of beer declined in North America from 24.3 gallons in 1980 to 23.3 gallons in 1988 --a downward trend driven by consumer concerns about health and successful campaigns against drinking and driving. However, both the number of imported beers available at retail and their sales volume increased sharply through the 1980's. The Mexican beer "Corona" is the second major imported beer in the USA (Heineken has first position) and holds a 15% imported beer market share. Its success is explained by having expanded sales to "captive" Mexican Americans and upper income, professional, urban-based male Americans seeking to be associated with a "signature" drink (in this case, a foreign beer that requires manipulating a slice of lime prior to imbibing, and that evokes an image of "man-of-the-world," "cosmopolitan," "beer aficionado" in certain consumers). The specialty beer category can offer the LAC brewery sector strong market opportunities if the beer produced can be differentiated from the competitive crowd through, for example, interesting packaging (flip top glass bottles), and/or associated ritual (stuffing the lime slice into the Corona bottle), or linking consumption of the beer with particular special occasions (the "birthday beer").

Cosmetics and Pharmaceuticals

In an earlier section, the importance of the cosmetic and pharmaceutical industries to suppliers of flavorings and essences was identified. This is a rich area of market opportunities for LAC agro-industrial firms and has been growing because of the increasing interest of North American consumers in health and beauty aids that are based on "natural" ingredients. The extraordinary success of the "Body Shop" franchise company is one example of how North American and European firms have responded to the escalating market opportunities for "natural" products. The retail shelves of the "Body Shop" outlets are festooned with soaps, perfumes, creams and emollients that contain, for example, avocado, almond, passion fruit oils and essences, extracts of papaya (Papain), aloe, and other exotica. "Over the counter" medicines that are "natural" hold strong attraction for the consumer, particularly those that pertain to alleviating problems of the lower bowel ("natural" laxatives), or are natural dyes, using extracts from the roots or plants or dried herbs for dyeing fabric or "modifying" the color of the consumer's hair. In these product categories —cosmetics, medicines— consumer knowledge of and trust in the manufacturing company are key determinants of purchasing behavior. As such, opportunities for the LAC firm exist in providing key ingredients for final products manufactured by a well-known and well-respected North American-based company.

Summary of High-Potential Products

In this initial overview of opportunities for LAC agroindustrial firms in the North American market, the focus has been on processed food products, and many of the examples have been on supermarket level, although equally applicable to the food service end of the food business. Indeed, the "up-market" food service business is, frequently, ahead of the consumer retail market on fresh and processed exotic food items (e.g., mini vegetables entered the North American market via the exclusive restaurant trade); and this component of the food service industry is not so much price conscious as it is aware of the degree to which the imported/exotic product adds value to menu items (e.g., an exotic, spicy, "hot" sauce adds interest to the main dish and can support a price tag on the main dish that bears little relationship to the unit portion cost of the sauce).

The range of products that can be characterized as agroindustrial is vast, including leathers of common herd animals and of exotic reptiles, textiles made from wool, silk, cotton, and linen. In each product category, there will be profitable market opportunities that can be captured by LAC firms if consumer demands are accurately identified, and adequately and profitably met. Even within traditional export product areas, export market opportunities can show high potential. For example, baling twine is not a high-profile product category, yet, for a combination of reasons, the production of sisal products is substantially more attractive now than it has been for years: a run of good hay harvests in Eastern Europe has stimulated demand for twine from this major market area; legislation and farmer's preference in Europe and North America has shifted demand away from twines to the "natural" sisal twine; and the major traditional supplier (Tanzania) is only very slowly rebuilding sisal production capacity after the decimation of the industry caused by nationalization in the 1970's. In short, LAC marketing managers should not simply seek to identify and capture markets for "new wave" products, but address the full gamut of opportunities that are present in North America for agroindustrial products.

A summary table is presented (Table 2) that identifies the extent to which the products designated as showing strong market potential for LAC agroindustrial firms meet key criteria for achieving export market success in North America. Commercial profitability for the firm has not been addressed, as this all-important variable will be scored differently by each firm, and will vary by country and region.

4. CONCLUSIONS FROM HIGH-POTENTIAL MARKET SECTOR STUDIES

Introduction

The short list of high-potential products identified in Table 2 in the previous section can be categorized into several generic commodity groups that merit more detailed study. Four groups were selected as offering particularly high-potential market opportunities for LAC firms: processed meats, processed fruits, and edible and inedible natural additives. Deloitte & Touche tasked industry experts to prepare reports on market opportunities and requirements to penetrate key markets in each of the four areas. The studies are presented in their entirety in Volumes II through V in this report series. A summary of the conclusions from the studies are presented below.

Processed Meats

Strong growth in North American consumers' consumption of white meats (poultry, fish) has caused the meat processing sector, with its traditional focus on red meats (beef, pork, lamb), to diversify and position itself as a supplier of meat meals and/or meat ingredients. Adding value to the raw product has become the order of the day, whether it be through: full meal preparation –frozen, shelf-stable; "refrigerated-fresh;" marinating, stuffing, precutting, fresh meat cuts for sale at retail; extending the range of fresh and deli meat items through niche marketing– "up-market" epicurian deli products, focusing on specific ethnic markets, offering "organically-produced" meat cuts; or producing meat ingredients for sale to manufacturers of "micro-waveable" soups, stews, pasta meals, and others. The transformation of the meat processing sector has been assisted by the introduction of new technologies that have revolutionized the consumer's perception of what is or is not a fresh or processed meat product –including, hard and soft vacuum packing, gas flushing (MAP), surimi processing, biotechnological product transformation, and the advent of retort processing to produce shelf-stable convenience meals.

What image does the LAC (specifically, Argentina, Uruguay, Brazil) meat processing sector have in the North American food industry? Deservedly or not, it is generally perceived in a negative light. Industry members interviewed expressed concerns about:

- pervasive animal health problems in LAC countries creating intrinsic raw material product difficulties for North American market entry;

- poor perceived quality of LAC meat products;

- perception of weak manufacturing and technological infra-structure in LAC;

- perceived weakness of LAC economies leading to concerns about ability to support R & D and marketing efforts required to penetrate North American markets and compete with North American firms;

- whether LAC labor skills are sufficient to meet the escalating technological requirements of processed meats;

- perception that Australian and New Zealand meat firms are better attuned to North American market requirements and are better equipped financially, managerially, and technically than LAC firms.

Whether these North American food industry perceptions have any basis in fact is critically important in the long term, and this negative image will continue to hold until LAC firms are seen as offering products with the following attributes: new items that meet contemporary consumers' food wants and the changing needs of the HRI sector; unequivocal claims on product safety; convenience for intermediate and final consumers; and value-added for all marketing participants.

For the firms that lead the meat processing sector in the LAC region, the challenge is to obviate the negative image through exhibiting technical excellence and a commitment to work with a North American partner in product innovation and development –importantly, firms must identify where they have a competitive advantage over firms from Oceania (e.g., LAC firms are in relatively close proximity to North America, and have a unique understanding of the burgeoning Caribbean/Hispanic niche markets in North America). LAC firms must diversify and reduce dependence on processed beef products to include export initiatives in value-added white meats. Apart from pork and poultry products, there are strong market opportunities for Chilean salmon, Ecuadorian shrimp, and the processed products of these items –smoked salmon, mousse, pre-prepared shrimp meals, shrimp-based surimi meal items, and others.

The nature of cooperative arrangements between LAC and North American firms should be flexible, reflecting the specific requirements of each partnership, and could include: manufacturing finished products as a co-packer for a North American manufacturer of shelf-stable meals (packed in retort trays or micro-waveable cups); developing a private label program with a North American retail chain; or incorporating a traditional LAC meat-based recipe with modern meat processing technology, perhaps under a licensing arrangement with a North American firm which, in turn, would be responsible for managing its final packaging and distribution to the Caribbean and/or Hispanic consumer markets in North America.

The delicatessen business has seen extensive new product development over the past few years. However, supply sources are becoming increasingly consolidated and the "bottom end" of the market for basic cold cut products –undifferentiated by brand– offers unattractive returns. The challenge for the processor is to solve the conundrum of how to reduce fat content, particularly in beef products, while maintaining a first class taste profile; there are exceptional business opportunities in this area.

In short, the challenge for the LAC meat processing firm is to discern the wants of target consumers, and then seek means to satisfy these wants at a profit, using whatever it takes —solo effort, cooperative endeavour, or formal joint-venture. This is a challenge that is shared by all firms that embrace the marketing concept —the start and end-point is the consumer.

Processed Fruits

The demand for processed tropical fruit products is buoyant in North America, driven by consumers' desire for new exotic items that are healthy, fresh and nutritious. The incessant drive for new products and constant innovation continues, and the trade perceives that this is a long-term trend, not simply a fad. The market power of major companies in the processed fruit business —merchandising premium, heavily-branded fruit products, increasingly with a tropical fruit component in the mix— is driving the market upward and providing expanded market opportunities, albeit at a high entry cost for the processor focusing on final retail products. Certainly, this is broadening the customer base for LAC processors who can satisfy the requirements of North American fruit processors, flavor and essence firms, ice-cream manufacturers, and major retailers seeking an expanded range of house brands.

Fruit "exotica" generally gets its start via the fresh produce market route: retailers seek novelty items for the free-spending, up-scale customer and traditional produce that is redolent of "back home" for the ethnic customer; the hotel and restaurant trade use unusual fresh fruit as a means of differentiating its meal product from the competition, adding value and therefore price to the meal ticket. Once the marketing "missionary" work has been completed, the exotic finds its own place in the market —either as a low volume specialty product bought as an unusual appetizer, for example, the kiwano (horned melon), or successfully enters the fresh produce mainstream, as in the case of the kiwi fruit, which no longer carries the exotic label (indicative of its market success is the fact that The New Zealand Fruit Co. and Chiquita are combining their respective marketing strengths to merchandise NZ kiwi fruits under the Chiquita brand name in North America). In the mature market stage, processed products are introduced and proliferate —kiwi fruit jam, chutney, juice blends, wine, etc. Given the current strong consumer interest in exotic fruit flavors, however, the less well-known tropical fruits can find a niche in their processed form without substantial exposure at the retail level in their fresh form.

North American firms in the processed fruit business perceive the following major market trends:

- an acceleration in demand for products with a tropical fruit base;

- shorter product life cycles for these products;

- an increasing consumer preference for "high impact" flavors, e.g., intense, zesty flavours such as passion fruit, rather than the more subtle flavour of guava or mango;

- more fruit blends and less single fruit products;

- increasing preference of North American firms to purchase processed fruit ingredients that can claim they are "chemical free;"

- aseptic technological advances have increased demand for fruits in their "chunky" form, as well as in juice, nectar, pulp, and purée forms;

- growing use of national "umbrella" country-of-origin labels as a means of promoting products from one country; for example, the use of the "New Zealand" label on all fresh and processed products from that country to gain the maximum leverage possible form the "clean, green" image that NZ has in developed country markets;

- expansion of private label business; increasingly, major retailers are seeking to source their own-label products and are willing to look offshore for supplies if continuity of supply and quality can be assured;

- specific fruits identified as having strong potential included passion fruit (immediate); soursop and tamarillo via the initial route of ethnic ice creams, yogurts, and juice blends; cherimoya, once retail prices for the fresh article have declined and stabilized (medium term); and mango as an ingredient, once mango texture problems have been solved.

One clear cut conclusion is that flavor, essence, and ingredient firms are generally unaware of the range of tropical fruit items that could enhance the flavor of their products. It behooves the LAC fruit processing firm to take the initiative and approach the flavor houses, to propose a joint product development program. Without fail, the LAC firm should show the North American firm that it understands the fundamentals of the North American market and the need to provide uniqueness of flavor, with a texture that is compatible with consumer taste preferences, if maximum marketing leverage is to be gained. Perusal of key trade magazines is a cost effective way of keeping abreast of market trends that can serve the LAC firm well in discussions with North American firms. Additionally, the LAC firm with access to secure sources of the more traditional juices (orange, pineapple) and berry juices, as well as new exotic juices, should consider a direct approach to major retailers, both with regard to developing specialty juices for the ethnic trade and broader market blended juice products for "the mass market."

Natural Edible and Inedible Additives

The products that comprise this composite category are dominated by dried spices and herbs —used to add flavor to food products, and in specialty pharmaceutical products; oils and essences— consumed by the fragrance and flavor industry and used in pharmaceutical, perfume and other cosmetics products, and in industrial cleaning product formulations; and, on a much smaller scale, natural colorants —used in adding color to both edible (human and animal foods) and inedible (paints, cosmetics) products. In general, these products are used in very small quantities in other manufactured products. The aggregate industry structure is characterized by a relatively large number of raw material suppliers selling to relatively few firms in the flavor and fragrance manufacturing sector who, in turn, sell to a very large number of firms in a host of industries, with the pharmaceutical, cosmetic and cleaning materials sectors providing the largest customer base.

Demand for, in particular, natural inedible products such as cosmetics and industrial cleaners is relatively inelastic and small shifts in supply can dramatically affect prices. As a result, industry members are reluctant to reveal sources of supply, quantities procured, price trends and price outlook in case their commercial interests are compromised. Growing consumer interest in spicy ethnic foods has boosted demand in this segment of the market and the consumer search for "natural" ingredients and additives in food products, in general, has simply served to further fuel the growth in demand.

Market share for essential oils of LAC origin in North America has been declining. This does not seem to be caused by competitive pressure from synthetics, but from increased production of raw materials (e.g., mint for processing into mint oil) in North America and loss of share to other offshore competitors. It is worrisome that natural additives from LAC countries are not perceived positively by some in the flavor and fragrance industry. There is a perception that LAC firms are not credible suppliers because:

- LAC countries are politically unstable.
- Management is weak and land and labor is not effectively used.
- High export taxes make LAC suppliers uncompetitive.
- Logistical problems and poor infrastructure hinder efficient transportation of goods within, the country.

These perceptions may or may not reflect reality, but they do influence North American firms' decisions on sources of purchase. The best means to shift perceptions to a more positive plane is for the individual firm to take the initiative and approach a North American buyer/firm with a proposal that offers mutual advantage through focusing on the elimination of key problems for the potential buyer: for example, spice processing firms are particularly concerned about pesticide residues and other contaminants in the imported, unprocessed bulk product; yet, if these concerns can be removed, then there are value-added processing opportunities for the LAC firm.

With regard to market opportunities for specific products, trade personnel identified the following most likely prospects:

- Spices and herbs —dried capsicums, cumin, ginger, oregano, cilantro, lemongrass, sesame and, to a lesser degree, fennel.

- Oils and essences —not promising in the short term, not least because North American processors are operating well below optimum capacity; however, the market for natural flavorings will continue to expand and it is a propitious time to start working with a North American-based processor on a joint R & D program. Seemingly unattractive product areas can suddenly offer attractive commercial opportunities —Oil of Evening Primrose provides a case in point; unexpected health claims for relieving the pain of arthritis and for mitigating the stress associated with pre-menstrual tension (PMT) caused demand for this oil to increase dramatically.

- Natural colorants —legislative moves to ban artificial additives in foods in Europe and consumer concerns about the same in North America will drive demand for natural products upward. However, natural color firms have specific product requirements often unique to each, and as a result natural color product development should be undertaken by the would-be LAC supplier in association with the North American-based processing firm.

Major Cross-Cutting Lesson from Market Studies

All four authors of the market studies agreed on a basic principle: for the LAC firm distanced geographically, culturally, and commercially from the export marketplace, it is often a wise strategy to link with a North American-based firm to reduce the costs and risks of new product development and launch. The extent of the linkage will depend upon the specific needs of the LAC firm and its potential North American partner, but could range from simple product licensing arrangements through to full-blooded joint venture participation. The initiative for such joint commercial action should come from LAC firms themselves. The shrewd LAC firm will identify the North American firms that comprise its pool of potential customers and/or partners, determine their problems in product sourcing and present a case to the North American firm(s) that best fits its potential partner profile for a joint action to solve production and marketing problems and bring financial reward to both parties.

ANNEX

ANNEX A

NEW FOOD PRODUCT INTRODUCTIONS ON TO THE NORTH AMERICAN MARKET, 1987-1989

	1987	1989	1989
Baby foods	8	19	8
Baking mixes	37	31	42
Bread and bread products	121	128	136
Cake mixes	16	18	13
Catsup	8	9	8
Cereals	86	90	132
Cheese	76	73	82
Chewing gum	13	19	22
Chips	91	95	95
Chocalate candies	118	90	114
Non-chocolate candies	91	79	81
Cookies	147	130	158
Crackers	38	51	58
Dairy substitutes	5	11	9
Other dairy case (non beverage)	9	14	17
Desserts	38	24	27
Special diet foods	30	26	51
Entree mixes	16	18	17
Fish	51	32	50
Fruit	32	43	32
Ice cream and cones	116	135	136
Jams and preserves	75	42	49
Margarine, butter, etc	18	16	16
Mayonnaise	14	4	19
Meals and entrées	121	140	148
Meat meals and entrées	33	82	40
Fish meals and entrées	16	25	17
Poultry meals and entrées	24	60	37
Vegetable meals and entrées	16	16	4
Meat	83	83	55
Miscellaneous foods	17	19	22
Mustard	46	36	34
Nuts and seeds	n/a	33	22
Oil and shortening	29	23	35
Pasta products	74	60	55
Pastry and baked products	99	95	96
Pickles, relishes, etc.	75	45	45
Popcorn	58	40	57
Poultry	48	59	45
Prepared salads	10	17	14
Rice and combos	33	35	42

Annex A-Continued

	1987	1988	1989
Salad dressing	68	59	52
Salad toppings/dips	21	24	18
Spaghetti/pasta sauces	43	29	34
Other sauces	152	131	117
Savoury spreads	6	18	8
Snack bars	22	21	23
Other snacks	106	77	105
Soup	70	45	61
Spices, seasonings, etc.	129	127	102
Staples	25	28	43
Sweet toppings	57	49	48
Vegetable proteins	27	21	28
Vegetables	92	98	87
Yogurt	31	37	40
BEVERAGES			
Other alcohol	29	21	32
Low alcohol	12	4	11
Baby beverages	2	6	8
Beer and ale	61	63	57
Beverage mixes	29	26	28
Cocktail mixes	10	5	10
Coffee	43	32	69
Fruit and fruit flavored	125	120	98
Health drinks	11	12	7
Isotonic drinks	15	15	19
Liqueurs	26	14	5
Milk and non-dairy milk	39	31	25
Milk additives	3	10	1
Mineral water	53	39	46
Miscellaneous	61	89	84
Tea	59	53	41
Vegetable flavored	8	8	11
Wine/wine cooler	64	63	27
TOTAL*	3.581	3.440	3.477

* Totals include new brand lines, brand and line extensions, new packaging.
Total "stock keeping units" (SKUS) —a measure used by the supermarket trade to indicate identifiable product accounting categories— far exceed this total figure. In 1988, for example, total new product introductions were 3,440 but the SKU total was 8,589, i.e. indicating that new products are introduced in more than one package size. It is this higher figure that is reported in the Gorman "New Product News" publications.

Source: Productscan/Marketing Intelligence Service, Naples, New York.

ANNEX B

ULRICH'S INTERNATIONAL PERIODICALS DIRECTORY, VOLUMES I AND II, 1989/90

SUBJECT CATEGORIES WITH AGROINDUSTRIAL RELEVANCE

Ulrich's International Periodicals Directory is published by R.R. Barker, a Division of Reed Publishing (USA) Inc. There are thirty pages of entries for the category "food and food industries," comprising well over 1,000 individual periodicals.

* Agriculture
  * Agricultural Economics
  * Dairying and Dairy Products
  * Feed, Flour and Grain
  * Poultry and Livestock
* Beauty Culture
  * Perfumes and Cosmetics
* Beverages
* Marketing and Purchasing
* Cleaning and Dyeing
* Clothing Trade
  * Fashions
* Consumer Education and Protection
* Fish and Fisheries
* Food and Food Industries
  * Bakers and Confectioners
  * Grocery Trade
* Forest and Forestry
  * Lumber and Wood
* Gardening and Horticulture
  * Florist Trade
* General Interest
* Home Economics
* Hotels and Restaurants
* Leather and Fur Industries
* Nutrition and Dietetics
* Packaging
* Pets
* Rubber
* Shoes and Boots
* Textile Industries and Factories
* Tobacco
* Travel and Tourism

ANNEX C

TRADE ASSOCIATIONS IN THE NORTH AMERICAN FOOD INDUSTRY

The following listing is taken from the Thomas Food Industry Register (1990/91) for the USA and the monthly magazine Food in Canada annual review of the industry for Canada. (Maclean Hunter Publishing Co.). In addition, for the interested reader, a list of selected major trade shows in 1990/91 are presented (same sources). (Reproduced herein unedited.)

ADVERTISING & PROMOTION AGENCY. MIDDLE ATLANTIC MILK MARKETING AREA
8600-g La Salle Rd./216 Carroll Bldg., Towson. MD 21204-6075 Tel: 301-321-0266

AIR CONDITIONING & REFRIGERATION INSTITUTE
1501-G Wilson Blvd. 6th Floor, Arlington, VA 22209
Tel. 703-524-8800: Telex: 89-2351
Company officials:
Pres: Arnold Braswell
Trade association representing manufacturers of air conditioning, refrigeration & heating equipment
Publications: KOLDFAX (newsletter)

ALABAMA MEAT PACKERS & PROCESSORS
2100-G Data Park One, Birmingham, AL 35244
Tel: 205-988-9880
Company officials:
Pres: Ron Morgan
Pres-Elect: Kenneth Moore

ALASKA SEAFOOD MARKETING INSTITUTE
P.O.Box D. Juneau. AK 99811
Tel: 907-586-2902
Company officials:
Exec Dir: Merry Futen

ALUMINUM FOIL CONTAINER MANUFACTURERS ASSN.
P.O.Box 1177. Lake Genova. WI 53147
Tel: 414-248-9208
Company officials:
Pres. J.C. Buff
VPres. E. Byrne
To promote and engage in relations between the manufacturers of aluminum foil containers, their customers and the general public to collect and disseminate statistical information

AMERICAN ASSOCIATION EXPORTS & IMPORTS

11-g w. 42nd St. New York, NY 10036
Tel: 212-944-2230

AMERICAN ASSOCIATION OF CANDY TECHNOLOGISTS (AACT)
175-G Rock Rd., Glen Rock, NJ

AMERICAN ASSOCIATION OF EXPORTERS & IMPORTERS INC
11-g w. 42 St., New York, NY 10036
Tel: 212-944-2230; Fax: 212-328-2606
Company officials:
Pres. Eugene J. Milosh
Chmn. John Sprouse
Secy./Treas.: Peter Handal
VPres.: Robert Leo

The promotion of fair and open trade among nations has been the primary mission of the American Association of Exporters and Importers (AAEI) for 68 years of its existence. AAEI provided members with a voice in Washington. With over 1200 U.S. member firms, AAEI is the only national association specifically representing both U.S. exporters and importers before the Executive Branch, Congress, the US Trade Representative, the US Customs Service and the Regulatory agencies.
1990 Meeting: 1990 Annual Forum on Int'l Trade and 69th Annual Luncheon The Grand Hyatt-New York June 13, 1990 Publications: International Trade Alert (weekly); International Trade Quarterly; Textile Quota Alert; GSP Red Flag; Membership Directory (annual)

AMERICAN ASSOCIATION OF MEAT PROCESSORS
P.O.Box 269, Elizabethtown, PA 17022
Tel: 717-367-1168; Fax: 717-367-9096
Company officials:
Exec. Dir. Stephen F. Krut

Membership is small, independent businesses in the meat, poultry and meat/food industry; includes every phase of business from slaughter to retail. The Association provides regulatory assistance, education and business services to the members.
1990 Meeting: American Convention of Meat Processors and Exhibition Kansas City, MO August 3-6, 1991
Publications: Bi-monthly Bulletin-The AAMPlifier/Capitol Line-Up; The Gold Book-Directory of Suppliers, Wholesalers & Members

AMERICAN BAKERS ASSOCIATION
1111-G 14th St. N.W., Washington, DC 20005
Tel: 202-296-5800

AMERICAN BRUSH MANUFACTURERS ASSOCIATION, BROOM & MOP DIV
1900-G Arch St. Philadelphia, PA 19103
Tel: 215-564-3484
Company officials:
Pres.Jerry ELorenz
Publications: ABM MEMBERSHIP DIRECTORY

AMERICAN CHAIN OF WAREHOUSES INC
100.G State St., Albany, NY 12207
Tel: 518-465-1796; FAX: 518-449-5703
Company officials:
Exec. VPres. Edward G. Lyons
VPres. Donald Greenland
A warehousing sales and marketing organization
Publications: Annual Directory

AMERICAN DAIRY ASSOCIATION
6300-G N River Rd. Rosemont, IL 60018
Tel: 708-696-1880
Company officials:
Chmn. Raymond E. Johnson
Vice Chmn: John J. Rosenow
Sec: Edward Nierman
Treas: Leslie Wintera
Pres: Joseph B Kelsch
To develop strategic marketing & advertising plans for milk & other dairy foods
Publications: PIPELINE

AMERICAN DAIRY ASSOCIATION AND DAIRY COUNCIL, INC.
472-G S. Salina St., 6th Fl., Syracuse, NY 13202-2486
Tel: 315-472-9143

AMERICAN DAIRY ASSOCIATION OF ILLINOIS.
THE
P.O.Box 116/1 West Front St., El Paso, Il 61738-0116
Tel: 309-527-4095

AMERICAN DAIRY ASSOCIATION OF SOUTH DAKOTA
619-G 5th Ave., Brookings, SD 57006.1498
Tel: 605-692-5131

AMERICAN DAIRY PRODUCTS INSTITUTE
130-G N. Franklin St., Chicago, IL 60606
Tel: 312-782-4888, 5455; FAX: 312.782.5299
Company officials:
VPres. D.S. Hanson
Pres. Harlan Mammen
Secy. Donald C. Storhoff
Treas. Nico van Zeanenberg
Jr.,Exec. Dir: w. Clark
Companies who process evaporated and dry milks and whey & whey products (including lactose), companies who provide supplies & services to the industry, firms who utilize industry products to provide technical, marketing, and informational services & to represent the industry on all subject matters of interest.
1990 Meeting: Joint Annual Meeting & Technical Conference Chicago O'Hare Marriott, Chicago, Il April 23-26. 1990
1991 Meeting: Annual Meeting Chicago
Marriott Downtown, Chicago, IL April 10-11 1991

THE AMERICAN DIETETIC ASSOCIATION
216-G W Jackson Blvd. Chicago, IL 60606-6995
Tel: 312-899-0040
Company officials:
Exec Dir. Julian F. Haynes

AMERICAN EGG BOARD
1460-G Renaissance Dr. Park Ridge, IL 60068
Tel: 708-296-7044
Company officials:
Pres. LRaffel
No of Employees: 26

AMERICAN FROZEN FOOD INSTITUTE
1764-G Old Meadow Lane, McLean, VA 22102
Tel: 703-821-0770; FAX: 703-821-1350
Company officials:
Pres. Emer. T.B. House
Pres. S. Anderson
Exec. VPres. F. Williams
Sr. VPres. H Symons
Washington, D.C. based national trade association representing frozen food processors and their suppliers and marketing associates.
1990 Meeting: National Frozen Food Convention & Exposition San Francisco Hilton & Towers. San Francisco, CA Oct. 14-17, 1990
1991 Meeting: National Frozen Food Convention & Exposition Marriott World Center, Orlando, FL Oct 6-9, 1991
Publications: Annual Membership Directory & Buyer's Guide: Frozen Food Report Magazine: AFFI Letter

AMERICAN INSTITUTE OF BAKING
1213-G Bakers Way, Manhattan, KS 66502
Tel: 913-537-4750; Telex: 88-1039 AIBMANUD: FAX: 913-537-1493

Company officials:
Pres. William J. Hoover
Research and education for baking industry

AMERICAN INSTITUTE OF FOOD DISTRIBUTION INC
28-12-G Broadway, Fair Lawn, NJ 07410
Tel: 201-791-5570: FAX: 201-791-5222
Company officials:
Pres. Roy Harrison
Exec. VPres. John Rengstorff
Founded in 1928, the A.I.F.D.-whose shortened name is The Food Institute-is a nonprofit information and research association serving the food industry. It has members in all 500 states and in 30 foreign countries and publishes the weekly "Food Institute Report" and special studies, including the annual "Food Business Mergers & Acquisitions"
Publications: THE FOOD INSTITUTE REPORT (weekly newsletter)

AMERICAN LAMB COUNCIL
6911 S Yosemite St. Englewood, CO 80112
Tel: 303-399-8130

AMERICAN LOGISTICS ASSOCIATION
1133 15 St. NW. #640. Washington, DC 20005
Tel: 202.466.2520
Company officials:
Pres. Richard E. Scott
Bd Chmn. Andy Lynn
Publications: INTERSERVICE (magazine), ALA WORLDWIDE DIRECTORY & FACT BOOK (directory)

AMERICAN MEAT INSTITUTE
1700 Moore St. North Ste. 1600. Arlington. VA 22209
Tel: 703-841-2400

AMERICAN MUSHROOM INSTITUTE
907-G E Baltimore Pike, Kennett Square, PA 19348
Tel: 215-388-7806. FAX: 215-388-0243
Company officials:
Exec Dir. Charles R Harris
Publications: Mushroom News

AMERICAN PAPER INSTITUTE, TISSUE DIV
260-G Madison Ave. New York, NY 10016
Tel: 212-340-0618
Company officials:
Div. Mgr. Roger Bognar

AMERICAN PET PRODUCTS MANUFACTURERS ASSOCIATION
60-G E 42 St. New York, NY 10165
Tel: 212-867-2290
Company officials:
Pres. Hal Bowman

AMERICAN PLYWOOD ASSOCIATION
P.O.Box 11700. Tacoma, WA 98411
Tel. 206-565.6600; FAX: 206-765-7265
Non profit trade association, representing member mills who manufacture structural wood panel products.

AMERICAN SHRIMP PROCESSORS ASSOCIATION
P.O.Box 50774. New Orleans, LA 70150
Tel: 504-368-1571
Company officials:
Exec. Dir. Wm D. Chauvin

AMERICAN SOYBEAN ASSOCIATION
P.O.Box 27300, St.Louis, MO 63141
Tel: 314-576-1770
Company officials:
Pres. Wayne Emmett
1st VP. James Lee Actkins Jr.

AMERICAN SPICE TRADE ASSOCIATION INC
580-G Sylvan Ave., Box 1267, Englewood Cliffs, NJ 07632
Tel. 201-568-2163; FAX: 201.568-7318
Company officials:
Exec. VPres. Thomas F. Burns
Secy. Eileen W. Engelhardt
Membership consists of international firms engaged directly or indirectly in the spice industry. Goal-to protect the interests and promote the welfare of its industry
1990 Meeting: The Westin Resort. Hilton Head. South Carolina April 29-May 3
Publications: ASTA Analytical Methods. 3rd Edition; ASTA Microbiological Methods.

AMERICAN WAREHOUSEMEN'S ASSOCIATION
1165-G Clark St., Chicago, IL 60610
Tel: 312-787-3377
Company Officials:
Pres. Jerry Leatham
Public merchandise warehousing & distribution firms make up the membership.
1991 meeting: 100th Annual Meeting Hyatt Maui, Hawaii, April 20-27, 1991

ANDSA, INC.
1-G Park Place, McAllen, TX 78503

ARIZONA FOOD BROKERS ASSOCIATION
P.O.Box 11247, 245-G E Watkins St. Phoenix. AZ 85061
Tel: 602-253-5752
Company officials:
Colorado Springs, CO; May 14-19, 1988:
Harry Ehlen

ARK LA TEX FOOD BROKERS ASSOCIATION
P.O.Box 52046, Shreveport, LA 71135
Tel: 318-861-4552
Company officials:
Pres. J.P. Sallky

ASSOCIATED GROCERY MANUFACTURERS' REPRESENTATIVES
326-G The Arcade, Cleveland, OH 44114
Tel: 216-621-3227
Company officials:
Pres. George Holt
1st VPres. William Morley
2nd VPres. Michael Browne
Treas. Mark Antonucci
Secy. Russ Dzurec
Social association of grocery sales representatives selling and serving northeastern Ohio.

ASSOCIATED MILK PRODUCERS, INC/SOUTHERN REGION
P.O.Box 5040, Arlington, TX 76005-5040
Tel: 817-461-2674

ASSOCIATED WAREHOUSES INC
P.O.Box 471, Cedar Knolls, NJ 07927
Tel: 201-539-1277
Company officials:
VP & Sec. Bruce P. Shearer
Pres. Robert M Eginton
VP. Curtis L. Wellmon
Treas. Herb Shear
Publications: RED BOOK DIRECTORY OF MEMBER SERVICES (bi-annual)

ASSOCIATION FOR DRESSINGS & SAUCES
5775-G Peachtree-Dunwoody Rd. Atlanta, GA 30342
Tel: 404-252-3663: Telex: 33-3437 TKCO: FAX: 404-252-0074
Company officials:
Exec Dir. Barbara Preston
Pres. Robert H. Kellen
An association of manufacturers of mayonnaise, salad dressing, condiment sauces, & related products.

ASSOCIATION OF FOOD INDUSTRIES, INC.
177-G Main St., Box 776., Matawan, NJ 07747
Tel: 201-583-8188; Telex: 21-9262 TLX UR; FAX: 201-583-0798
Company officials:
Exec. VPres. Richard J. Sullivan
Pres. Irwin Tane
To foster free trade and promote commerce in food products. To seek uniformity and certainty in the customs and usage of the trade through the use of standardized contracts. To settle controversies by arbitration and to represent the interests of its members before government agencies.
1990 Meeting: AFI Annual Convention Seaview Golf Resort, Absecon, N.J. April 26-29, 1990
Publications: Association of Food Industries 89 (Annual); AFI Newsletter

ASSOCIATION OF HOME APPLIANCE MANUFACTURERS
20-G N. Wacker Dr. Chicago, IL 60606
Tel: 312-984-5800
An international non-profit organization of the major & portable home appliance industry.;
Publications: Various certification directories for home appliances.

ASSOCIATION OF RETAIL MARKETING SERVICES
3-G Caro Ct., Red Bank, NJ 07701
Tel: 201-842-5070
Company officials:
Exec. Dir. George Meredith
Pres. K. Sullivan
1st VPres. V. Neel
2nd VPres. J. Sheridan
3rd VPres. J. Prince
Secy. R. Mehring
Treas. G. Magida
ARMS is the forum of incentive promotion at the retail level. ARMS provides a clearing house for knowledge and information of marketing programs such as supermarket continuities, trading stamps, tape redemption plans, games & sweepstakes bank prems., fast food promotions, traffic-builders, give aways & direct premiums.
Publications: The Register Newsletter; Creative Marketing Newsletter

AUSTRALIAN TRADE COMMISSION
636 Fifth Ave., New York, NY 10111
Tel: 212-245-4000

AUSTRALIAN TRADE COMMISSION
611-G N°. Larchmont, Los Angeles, CA 90004-9998.
Tel: 213-469-4300 Ext. 218

BALTIMORE/WASHINGTON FROZEN FOOD ASSOCIATION
P.O.Box 1450, Columbia, MD 21044
Tel: 301-781-4764
Company officials:
Pres. Ron Geren
VPres. Lew D'Agostino
Treas. Rosemary Orner
Secy. Nora Wyatt
Association is comprised of brokers, retailers, wholesalers, packers,

shippers, warehouses, trade newspapers, anyone connected to the profession of frozen food. The ultimate goal of the association is the promotion of frozen food, through consumer awareness.
1990 Meeting: BWFFA Trade Reception
Martins Crosswinds, Greenbelt, MD November 15, 1990
1991 Meeting: BWFFA Trade Reception Martins Crosswinds, Greendbel, MD Not set yet.

B.C. PAVILION CORP. FOOD PACIFIC 90
1190 Mellvile St., Vancouver, BC, CAN V6E 3W1
Tel: 604-684-3663; Telex: 04-357817; Fax: 604-660-2295
Company officials:
Pres/CEO. Dr. H Walker
To develop and stage an international food and beverage trade exhibition
Publications: Show Directory

BEEF INDUSTRY COUNCIL NATIONAL LIVESTOCK AND MEAT BOARD
444-G N Michigan Ave. Chicago, IL 60611
Tel: 312-467-5520

BISCUIT & CRACKER DISTRIBUTORS ASSOCIATION
111-G E Wacker Dr. Chicago, IL 60601
Tel: 312-644-6610; Fax: 312-565-4658
Company officials:
Pres. W Ayres
VP. T Leonard

BISCUIT & CRACKER MANUFACTURES ASSOCIATION
888-G 16 St. N.W., Washington, DC 20006
Tel: 202-223-3127
Company officials:
Pres. Francis P. Rooney
1990 Meeting: Annual Convention Marriott's Sawgrass, Ponte Vedra Beach, FL April 22-25. 1990
1991 Meeting: Annual Convention La Quinta Hotel, La Quinta, CA April 7-10, 1991

BONGARD'S COOP CREAMERY ASSN.
13200-G County Rd. 51, Bongards, MN 55368
Tel: 612-466-5521

BOSTON RETAIL GROCERS ASSOCIATION
P.O.Box 652, Canton, MA 02021
Tel: 617-828-9030
Company officials:
Pres. Gerald Goulston
1st VPres. Charles Oppedisano
2nd VPres. Anthony Ristuccia
Secy./Treas. John Pardy

BRADFORD & CO. INC.
P.O.Box 230939, Montgomery, AL 36123-0939
Tel: 205-271-6074; TWX: 910-333-6926

BREWERS' ASSOCIATION OF AMERICA
4751-G Lindle Rd. Harrisburg, PA 17111-2432
Tel: 717-939-7722
Company officials:
Pres. F X Matt II

BRITISH TRADE DEVELOPMENT OFFICE
845 3rd Ave., 11th Fl., New York, NY 10022
Tel: 212-593-2258

CALIFORNIA APRICOT ADVISORY BOARD
1280-G Blvd. Way, Walnut Creek, CA 94595

Tel: 415-937-3660
Company officials:
Bd. Chmn. S Lester
Bd. Vice Chmn. R Benech
Secy & Treas. R Benech
Publications: APRICOT QUARTERLY ROUNDUP (newsletter)

CALIFORNIA ASPARAGUS GROWERS ASSOCIATION
P.O.Box 1762, Stockton, CA 95201
Tel: 209-465-3482
Company officials:
Exec Mgr. W DePaoli
Non-profit organization of commercial asparagus growers involved in marketing of fresh market asparagus and processor bargaining

CALIFORNIA AVOCADO COMMISSION
23232 Ste 109 Peralka Dr. Laguna Hills, CA 92653
Tel: 714-859-4110

CALIFORNIA BEAN SHIPPERS ASSOCIATION
1010-G Hurley Way, Sacramento, CA 95825
Tel: 916-446-3777; Telex: 37-7447 HQBSAC; FAX: 916-929-0228
Company officials:
Secy./Treas. Jennifer Khal
1991 Meeting: Santa Barbara Feb. 1991

CALIFORNIA BEEF COUNCIL
551 Foster City Blvd. Ste A. Foster City, CA 94404
Tel: 415-571-7100

CALIFORNIA CLING PEACH ADVISORY BOARD
P.O.Box 7111, San Francisco, CA 94120
Tel: 415-541-0100; Telex: 278724 Cling Ur.: Fax: 415-541-0296
Company officials:
GM: T Krugman
Mgr. Merchng & Prom: M Miller

CALIFORNIA GROCERS ASSOCIATION
906 G St. Ste 700, Sacramento, CA 95814
Tel: 916-448-3545; Fax: 916-448-2793
Company officials:
Pres. CEO: Don C. Beaver
VPres. COO: Doris Buchman
CGA is a non-profit statewide trade association which has represented the California food industry for almost 100 years. The Association provides a political voice for California grocers, wholesalers, brokers, suppliers and manufacturers. Retail members include national and regional chain stores, convenience stores, liquor stores, supermarkets and neighborhood grocers.
1990 Meeting: 1990 California Grocers Association Convention and Trade Show Reno Convention Center, Reno, NV Oct. 12-14, 1991
Publications: California Grocer

CALIFORNIA LEAGUE OF FOOD PROCESSORS
1112 "I" St. Ste 100. Sacramento, CA 95814
Tel: 916-444-9260; FAX: 916-444-2746
Company officials:
Pres: Lawrence K Taber
California League of Food Processors is a trade association representing 63 fruit & vegetable processors in California, statistics to industry on products packed; public industry, legislative & regulatory agencies.
1990 Meeting: California Showcase of Processed Foods Santa Clara Convention Center: Santa Clara, Calif. Jan. 25, 1990

Publications: Membership Directory ($15 00). Newsletter (monthly) ($17 00)

CALIFORNIA MILK ADVISORY BOARD
400 Oyster Pt. Blvd., Ste. 214, South San Francisco, CA 94080
Tel: 415-871-6455

CALIFORNIA RAISIN ADVISORY BOARD
P.O.Box 5335, Fresno, CA 93755
Tel: 209-224-7010
Company Officials:
Chmn. Vic Marcarian
Gen Mgr. Clyde Nef

CALIFORNIA STRAWBERRY ADVISORY BOARD
P.O.Box 269. Watsonville, CA 95077
Tel: 408-724-1301

THE CALORIE CONTROL COUNCIL
5775 Peachtree-Dunwoody Rd. Ste 500D
Atlanta, GA 30342
Tel: 404-252-3663: Telex: 33-3437 TKCO: FAX: 404-252-0774
Company officials:
Pres. Robert H Kellen
Exec Dir. Robert C Gelardi
An international association of manufacturers & suppliers of dietary foods & beverages whose objectives include fostering growth & development of low calorie foods & beverages

CAN MANUFACTURERS INSTITUTE
1625-G Massachusetts Ave., N.W., Washington, DC 20036
Tel: 202-232-4677
Company officials:
Pres. J.M. Dunn
Exec. VPres. John Mcintyre
The trade association represents the can manufacturing industry and its suppliers.
1990 Meeting: Spring Meeting of the Board of Governors and Members Washington, DC May 29-30, 1990
1991 Meeting: Winter Meeting of the Board of Governors and Members Chicago, IL March 12, 1991
Publications: FEDERAL STATE REVIEW (newsletter)

CANADIAN DAIRY & FOOD INDUSTRIES SUPPLY ASSOCIATION
RR 1, Bradford, ON. CAN L3Z 2A4
Tel: 416-939-2545
Company officials:
Pres. D Clutier
VPres. D McKay
Treas. D Green
P.R. S Pritchard
Firms manufacturing or dealing in equipment supplies or services for manufacturers of dairy and/or food products

CANADIAN RESTAURANT & FOODSERVICE ASSOCIATION
80 Bloor St. W. Toronto, ON, CAN M5S2V1
Tel: 416-923-8416

CANADIAN WAREHOUSING ASSOCIATION
P.O.Box 125. Oshawa, ON. CAN L1H 7L1
Tel: 416-436-8801; FAX: 416-436-0991
Company officials:
Exec. Dir: D Kentish
Pres. P Molmes
VP. B Miller
Treas. B Kaneb
A trade association of companies in the public warehousing and distribution industry including both dry general merchandise and refrigerated facilities. The association

represents approximately 70% of the public warehousing capacity across Canada, also having associate members in other countries. The goals of the Association include promotion of the use of public warehousing and distribution services by the manufacturing and commercial sector, establishing and enforcing appropriate industry operating and education among members and representing the industry to government, other institutions and agencies.
1990 Meeting: Annual Convention Banff. Alberta, Canada May 27-29
1991 Meeting: Annual Convention St. John's Newfoundland, Canada June 2-4 (Tentative)

CATFISH FARMERS OF AMERICA
1100-G Highway 82 East, Indianapolis, MS 38751
Tel: 601-887-2699
Company officials:
Chmn. Rodney Henderson
Pres. Julian Allen
VPres. Bardin Redditt
Exec. VPres. Hugh Warren III
Represents farm-raised catfish industry.
Publications: The Catfish Journal

CENTRAL FLORIDA FROZEN FOOD ASSOCIATION
P.O.Box 4645, Tampa, FL 33677
Tel: 813-872-5541
Company officials:
Pres. Robert C Trigg

CENTRAL INDIANA FROZEN FOOD ASSOCIATION
8851 Hague Rd. Indianapolis, IN 46256
Tel: 317-842-7700

CENTRAL OHIO RETAIL GROCERS ASSOCIATION
1029 Harrisburg Pike, Columbus, OH 43223
Tel: 614-276-4193
Company officials:
Exec Dir. Sammi Soutar
Publications: CORGA Bulletin (monthly)

CHARLESTON FOOD BROKERS ASSOCIATION
1840-G Carriage Lane, Charleston, SC 29407
Tel: 803-766-9482
Company officials:
Pres. William B Deas
VPres. Charlie Lining
Secy./Treas. Marguerite A. Cluverius

CHARLOTTE FOOD BROKERS ASSOCIATION
Box 34309, Charlotte, NC 28234
Tel: 704-372-5050
Company officials:
Pres. Adam T. Maples

CHEESE IMPORTERS ASSOCIATION OF AMERICA
460-G Park Ave. New York, NY 10022
Tel: 212-753-7500; Telex: 23-7894 HART UR; FAX: 212-688-2870

CHEMICAL SPECIALTIES MANUFACTURERS ASSOCIATION INC
1913 "E" St., Washington, DC 20006
Tel: 202-872-8110
Company officials:
Pres. R. Engel
VP. Steve Keliner
Publications: VENDORS TO THE TRADE (directory), EXECUTIVE NEWS WATCH (newsletter), CHEMICAL TIMES & TRENDS (magazine).

CHICAGO WHOLESALE GROCERS ASSOCIATION
29-G S. LaSalle St., Chicago, IL 60603
Tel: 312-236-2128
Company officials:
Exec Dir. Irwin S. Thall

CHOCOLATE MANUFACTURERS ASSOCIATION
7900 Westpark Dr. A-320. McLean, VA 22102
Tel: 703-790-5011: TWX: 710-833-0898 CMA/ACRI
Company officials:
Pres. Richard T O'connell
An Association which promotes, protects & enhances the chocolate industry's interests through legislative & regulatory programs, public relations & research.

CLEVELAND FOOD DEALERS ASSOCIATION INC
420 4-G Detroit Ave., Cleveland, OH 44113
Tel: 216-961-4836
Company officials:
Exec Dir. Alvin J. Palack
Pres. E. Figler
1st VPres. M. Bush
Treas. J. Sanford
A service organization for independent food retailers.
Publications: THE CLEVELAND FOOD DEALER (monthly maganize)

CLEVELAND GREENHOUSE VEGETABLE GROWERS COOPERATIVE ASSOCIATION
430-G West Bagley Rd., Barea, OH 44017
Tel: 216-243-5600
Company officials:
Sec./Treas. Joan Stemmer

COLD SPRING CO-OP CREAMERY ASSOCIATION
Box 423, Cold Spring, MN 56320
Tel: 612-685-8651
Company officials:
Pres. Ralph Johannes
Publications: PIPE LINE (newsletter)

COMMERCIAL REFRIGERATOR MANUFACTURERS ASSOCIATION
1101 Connecticut Ave Suite 700, Washington, DC 20036
Tel: 202-857-1145; FAX: 202-223-4579
Company officials:
Exec Dir. Robert T Chancier
Pres. G Douglas Aiken
Immediate Past Pres. James E Mack
VP. L Dale Chalker
An association whose objetive is to educate its members in solving common problems & stimulating industry growth.

CONCORD GRAPE ASSOCIATION
5775 Peachtree-Dunwoody Rd. Suite 500-D Atlanta, GA 30342
Tel: 404-252-3663; Telex: 333437 TKCO ATL. FAX: 404-252-0774
Company officials:
Pres. R Kellen
Exec Dir. L Davenport
To promote the best interests and the welfare of the American Concord grape industry

CONSULATE GENERAL OF DENMARK
825 3rd Ave/Fir 32. New York, NY 10022-7596
Tel: 212-223-4545

CONSULATE GENERAL OF THE NETHERLANDS
1 Rockefeller Plaza, New York, NY 10020
Tel: 212-246-1429

CONSULATE OF BELGIUM
229 Peachtree St. N.E. Peachtree Center Cain Tower Suite 2306, Atlanta, GA 30303
Tel: 404-659-2150

CORPUS CHRISTI DISTRICT RETAIL GROCERS ASSOCIATION INC
P.O.Box 6052, Corpus Christi, TX 78466
Tel: 512-852-7853
Company officials:
Pres. C. Scott
1st VP. J Feudo
2nd VP A Garcia Jr
3rd VO D Zunker
Exec Dir. Dorothy Krause

COSMETIC TOILETRY & FRAGRANCE ASSOCIATION INC
1110 Vermont Ave NW. Ste 800. Washington, DC 20005
Tel: 202-331-1770
Company officials:
Pres. E. Edward Kavanugh
Exe VP. Robert P Brady

COUNCIL FOR RESPONSIBLE NUTRITION
13300 9th N.W. Suite 310. Washington, DC 20036
Tel: 202-872-1488

DAIRY & FOOD INDUSTRIES SUPPLY ASSOCIATION
6245-G Executive Blvd., Rockville, MD 20852
Tel: 301-984-1444; Telex: 908706; FAX: 30-881-7832
Company officials:
Exec VP. John M. Martin
DFISA is an international trade association of equipment and supply companies serving the dairy, food & beverage processing industries. The association sponsors food & dairy expo.
1990 Meeting: Annual Conference Camelback Resort. Schottsdale, AZ March 18-21
1991 Meeting: Annual Conference Marriott's Harbor Beach, Ft. Lauderdale, FL April 7-10
Publications: Reporter Newsletter; Dairy Processor Directory

DALTON CO-OP CREAMERY ASSOCIATION
PO 248, Dalton, MN 56324
Tel: 218-589-8806
Company officials:
Pres. Wayne Borland
Sec. Ted Meyers

DELICATESSEN COUNCIL OF SOUTHERN CALIFORNIA
12631-G E- Imperial Hwy., Santa Fe Springs, CA 90670
Tel: 213-929-6788

DENMARK CHEESE ASSOCIATION
2100 M St. Suite 305. Washington, DC 20037
Tel: 202-775-8393; Telex: 137377
Company officials:
Pres. Jorgen Kolding
Publications: DANISH CHEESE NEWS
(newsletter)

DFW GROCER'S ASSOCIATION
1515-G W. Mockingbird, Dallas, TX 75235
Tel: 214-630-2139
Company officials:
Pres. Holly Bird
Exec. Dir. D. Nelson
Membership is made up of the supermarket and convenience store

owners and suppliers from a twenty county area of north central Texas
Publications: Food Herald

DRIED FRUIT ASSOCIATION OF CALIFORNIA
P.O.Box 270A, Santa Clara, CA 95052
Tel: 408-727-9302
Company officials:
Pres. Frank A Mosebar
VP T Manee
Treas: R. J. Young
Sec: R Novy

EASTERN DAIRY-DELI ASSOCIATION
P.O.Box 156, Great Neck, NY 11021
Tel: 516-487-4640

EASTERN FROSTED FOODS ASSOCIATION INC
20-G West Park Ave., Long Beach, NY 11561
Tel: 516-431-1772
Company officials:
Pres. Sidney Schwartz
Chmn of Bd. John Barone
Publications: Newsletter

EDINBURG CITRUS ASSOCIATION
410-G W Chapin, c/o P.O.Box 42B, Edinburg. TX 78540
Tel: 512-383-2743

FISHERIES COUNCIL OF CANADA
505-77 Metcalfe Street, Ottawa, ON, CAN K1P5L6
Tel: 613-238-7751: FAX: 613-238-3542
Company officials:
Pres. R.W. Bulmer
VPres. P. Mcguinneaa
Convention Co-Ordinator: D. Kennedy
We are a trade association representing fish processors and distributors in Atlantic Canada. Quebec and Ontario. The Council's objective is to assist & promote the interests and well-being of the commercial fishing industry. It's main task is to maintain liaison with the federal government, its departments and agencies.
1990 Meeting: Fisheries Council of Canada's Annual convention St. John s, Nfld, Oct 16-18
Publications: Bulletin, Fish & Seafood, Products & Services Directory

FLAVOR AND EXTRACT MANUFACTURERS ASS'N OF THE UNITED STATES
1620-G I St. N.W. #925, Washington, DC 20006
Tel: 202-293-5800: Telex: 288617, Fax: 202-463-8998
Company officials:
Atty & Exec. Secy.: Daniel R. Thompson
Membership consists of manufacturers and users of flavors and flavoring ingredients.
1990 Meeting: 81st Annual Meeting Boca Raton Resort & Club, Boca Raton, Fla. May 6-9, 1990
1991 Meeting: 82nd Annual Meeting The Breakers, Palm Beach, Florida April 7-10, 1991

FLORIDA CITRUS MUTUAL
Citrus Mutual Bldg, Box 89, Lakeland, FL 33802
TEl: 813-682-1111; FAX: 813-682-1074
Company officials:
Exec VP: Bobby F Mckown

FLORIDA CITRUS PROCESSORS ASSOCIATION
P.O.Box 780, Winter Haven, FL 33882
Tel: 813-293-4171
Company officials:
Exec VP: Clifford C Beasley Jr.

FOOD EQUIPMENT MANUFACTURERS ASSOCIATION
11-G E. Wecker Dr. Chicago, IL 60601
Tel: 312-644-6610

FOOD FROM BRITAIN
P.O.Box 70997, Marietta, GA 30007-0997
Tel: 404-955-4074

FOOD INDUSTRY ASSOCIATION EXECUTIVES
P.O.Box 219, Lau Cruces, NM 88004
Tel: 505-523-1992

THE FOOD INSTITUTE
28-12 Broadway, Fair Lawn, NJ 07410
Tel: 201-791-5570

FOOD INSTITUTE OF CANADA
130 Albert St. Suite 1409, Ottawa, ON, CAN K1P 5G4
Tel: 613-233-4049. FAX: 613-728-4394
Company officials:
Exec Dir. Christopher Kyte
Meeting Planner. D Stewart
An association whose objective is to support member processors, packers, distributors & brokers to increase consumption of frozen foods
Publications: CFFA MEMBER DIRECTORY ACCESS (newsletter), CFA TECHNICAL CUMMINIQUE

FOOD MARKETING INSTITUTE
1750-G K St. N.W. Washington, D.C. 20006
Tel: 202-452-8444: Fax: 202-429-4519
Company officials:
Pres. Robert O. Aders
Conducts programs in research, education & public affairs for 1600 food retailers and wholesalers.
N° of Employees: 115

FOOD RETAILERS ASSOCIATION OF SOUTH CAROLINA
P.O.Box 7007, Columbia, SC 29202
Tel: 803-256-7351
Company officials:
Pres. W. Goodman
1st VP. E. Brown
Publications: SOUTH CAROLINA FOOD JOURNAL

FOOD & WINES FROM FRANCE, INC
24 E, 21st St. New York, NY 10010
Tel: 212-477-9800

FOODSERVICE CONSULTANTS SOCIETY INTERNATIONAL
12345-G 30 Ave. N E. Seattle, WA 98177
Tel: 206-362-7780. FAX: 206-367-1121
Company officials:
Pres. Anthony Clevenger
Pres. Elect. Salvatore Romano
Secy. Carl Vail
Treas. Thomas Costello
Part Pres. John Birchfield
FCSI is a non-profit organization which provides a professional society for consultants in design, equipment, engineering and management to the foodservice industry and furthers research, development and education in the foodservice industry.
1990 Meeting: FCSI 35th Annual Seminar The Drake Hotel, Chicago, IL May 17-18, 1990
Publications: The Consultant (quarterly professional journal) plus several others (newsletters, technical bulletin, etc.) which are available to members only.

FOODSERVICE EQUIPMENT DISTRIBUTORS ASSOCIATION
332-G S Michigan Ave. Chicago, IL 60604
Tel: 312-427-9605
Company officials:
Pres. Walter Simon
1st VP. Ken Gill

Publications: FEDA MEMBERSHIP DIRECTORY FEDA NEWS & VIEWS (Magazine)

FOODSERVICE & PACKAGING INSTITUTE
1025-G Connecticut Ave. N.W., Washington, DC 20036
Tel: 202-822-6420: FAX: 202-785-1398
Company officials:
Pres. J. Bow
VPres. N. Sherman
Dir of Communications. J. Spina
National trade association for manufacturers and suppliers of disposables for foodservice and packaging
1990 Meeting: Board of Directors Meeting San Diego, CA (Le Meridien Hotel) March 15-18, 1990
Publications: Single Service News

FROZEN FOOD AFFILIATION OF CENTRAL NEW YORK
1708-G State Fair Blvd., Syracuse, NY 13209
Tel: 315-635-6338. FAX: 315-635-1798
Company officials:
Bd. Chmn. Richard D. Thompson
Pres. David Grabosky
VPres. Kevin Reardon
Treas. Nick Balzano
Members are from food sales and wholesale chain buying groups. The goal is to create more awareness of frozen food and increase sales

FROZEN FOOD ASSOCIATION OF NEW ENGLAND INC.
77 Great Rd. Acton, MA 01720
Tel: 508-263-1171
Company officials:
Pres. R. Sylvia
1st VP. V. Rinaldi
2nd VP K. Call
3rd VP. P. Medeiros
Trade Assn, promote frozen food
Publications: New England Frozen Food Directory. FFANE News

FROZEN FOOD COUNCIL OF NORTH CAROLINA
801-G E- Blvd., Charlotte, NC 28203
Tel: 704-334-9744

FROZEN FOOD COUNCIL OF NORTHERN CALIFORNIA INC
1650-G Borel Pl, San Mateo, CA 94402
TeL: 415-341-7330: FAX: 415-349-4473
Company officials:
Bd Chmn. P. Brooks
Pres. L. Booth
VPRes. J. Nash
Vpres. M. Gifford
Admin. F. Jay Prisco
Retailers, packers, brokers, warehousing/distribution, media and related services belong, Council is a working organization dedicated to promote the sale of retail branded frozen foods through consumer promotions and education using multi-media programs several times a year.
1990 Meeting: Annual General Membership Meeting: Pleasanton Hilton, Pleasanton, California November 29, 1990
Publications: Quarterly Newsletter: Annual Directory

FROZEN FOOD COUNCIL OF WASHINGTON
3021 37 W. Seattle, WA 98199
Tel: 206-284-3021
Company officials:
Pres. H. Foorsberg
VPres. Denis Schafer
Exec. Dir. B. Stewart
Treas. G. Gregory
Promotion of frozen foods at retail level for the Pacific Northwest

FROZEN FOOD ROUNDTABLE
1055 Thomas Jefferson St., N.W., Washington, DC 20007
Tel: 202-342-8400

FROZEN POTATO PRODUCTS INSTITUTE
1764-G Old Meadow Lane, Mclean, VA 22102
Tel: 703-821-0770
Company officials:
Exec Dir. Steven C. Anderson
1990 Meeting Annual Meeting San Francisco Hilton, Oct 14, 1990
1991 Meeting: Annual Meeting Marriott World Center, Orlando, FL Oct 6, 1991

FROZEN VEGETABLE COUNCIL
1838 El Camino Real, Burlingame, CA 94010
Tel: 415-697-6835
Company officials:
Chmn. Paul Altorter
Pres. Tom House
Sec & Treas Jean Bohanan
An association devoted to promoting sales & consumption of frozen vegetables
Publications: Cold Facts (quarterly newsletter)

GENERAL FORMAT CORP
393 Crescent Ave. Wyckoff, NJ 07481
Tel: 201-848-8250

GEORGIA ASSOCIATION OF CONVENIENCE STORES
P.O.Box 739 Tucker, GA 30085
Tel: 912-474-1096
Company officials:
Pres. BarronThorpe
Chrmn. R. Wallace

GEORGIA GROCERS ASSOCIATION
3200 Higlands Parkway Ste. 210, Smyrna, GA 30082
Tel: 404-438-7744
Company officials:
Exec. Dir. Sharon Mobley
Bd of Dir Pres Glen Adams
Publications GEORGIA GROCER (Magazine)

GEORGIA WHOLESALE GROCERS' ASSOCIATION
P.O.Box 7776 Macon, Ga 31209
Tel: 912-474-1096
Company officials:
Exec. VPres. B. Thorpe
Pres. J. Cofer
VPres. B. Griffis

GERMAN AGRICULTURAL MARKETING BOARD CMA
950-G Third Ave, New York, NY 10022
Tel: 212-753-5900: Telex: 17-7841
CMA US FAX: 212-826-3278
Company officials:
Managing Dir. Thomas Willing
Mgr. Trade Relations Margaret C. Eckert
Mktg. Coord. Brigitte Rothlisberger
Purpose is the gathering support of agricultural as well as processed food and beverage products, represents the export and beverage industries.
Publications Product Catalog USA, Buyers Guide USA & Canada, Lucull, Catalog

THE GLUTAMATE ASSOCIATION - UNITED STATES
5775 Peachtree-Dunwoody Rd. Suite 500-D. Atlanta, Ga 30342
Tel: 404-252-3663: Telex: 333437, TKCO, ATL, FAX: 404-252-0774
Company officials:
Pres. H. Kellen
Exec Dir. R. Cristol
Manufacturers, distributors & processed, food users of glutamic acid & its salts, monosodium glutamate (MSG), information,

sponsors research & food safety, programs that provides technical & scientific assitance to industry.

GREEN COFFEE ASSOCIATION OF NEW YORK CITY INC
116 John St. New York, NY 10038
Tel. 212-619-5095; Cable: Green York; Telex: 427-840
Company officials:
Pres. G. Fisher
VP. P Fischer
Treas: r. Etkin

GROCERS ASSOCIATION OF IOWA
2894-G 106 St. Des Monies, IA 50322
Tel: 515-270-2628
Company officials:
Pres. Trish Smallenberger
Chrmn/Bd. B. Hand
To promote and protect the Iowa grocery industry
Publications: Iowa Food Dealer, Scanner

GROCERY MANUFACTURERS OF AMERICA, INC.
1010 Winsconsin Ave. #600, Washington DC 20007
Tel: 202-337-9400: Telex 62913234 EASYLINK
Company officials:
Pres & CEO: G. Koch
VP Sci & Tech: S Gardner
VP. Ind Rel: P. Kiernan
VP. Legislation & Admin: K. Ramsey
Grocery Manufactures of America, Inc is a trade association of the leading manufacturers and processors of food and non-food products sold in retail grocery outlets througout the United States, GMA's objective is to address for member companies those goals

GROCERY MANUFACTURERS' REPRESENTATIVES OF EASTERN NEW YORK INC
c/o Capital Newsletter, Box 15000, Albany, NY 12212
Company officials:
Sec. Chris Cunningham Jr

GROCERY MANUFACTURERS' REPRESENTATIVES OF NEW YORK NY INC
Box 414, Mamaroneck, NY 10543
Tel: 914-698-7510
Company officials:
Pres. Michael Buguicchio
Exec.VPres. Martin Lilie
Treas. R. Mueller
Secy. A. Stockann
to encourage and preserve sound, fair and ethical business practices in the industry. To promote efficient and constructive merchandising in the industry to foster and promote good will and fellowship among members. To conduct informative meetings and programs on current business trends affecting members and the food industry.

GROCERY MANUFACTURERS' REPRESENTATIVES OF ROCHESTER INC
Democrat & Chronical/Times-Union
55 Exchange Blvd. Rochester, NY 14614
Tel: 716-232-7100
Company officials:
Exec. Sec: Bob Atwell

GROCERY MANUFACTURERS' REPRESENTATIVES OF UTICA, NY INC
221-G Oriskany Plaza, Utica, NY 13503
Tel: 315-792-5066-5119
Company officials:
Trade Liaison: C.Williams

Pres.: Dany James Miller
Ill. VPres. Lafavette D. Jones
Treas. Patricia Rowlands

GROCERY PRODUCTS MANUFACTURERS OF CANADA
1185 Eglington Ave, Toronto, ON.CAN M3C3C6
Tel: 416-429-4444

HAWAII FOOD INDUSTRY ASSOCIATION
677-G Ala Moana Blvd., Honolulu, HI 96813
Tel: 808-533-1292
Company officials:
Exec. Dir. Richard C. Botti
Pres. H. Gamble
VP. H. Tamura
VP. J. Belly
Sec/Treas. W. Teruya
Retailers/wholesalers/suppliers/distributors
Publications: Annual Buyers Guide & Report Quarterly Industry Magazine

HOLLAND CHEESE EXPORTERS ASSOCIATION
47 Orient Way, Rutherford, NJ 07070
Tel: 201-935-0086

HOUSTON FOOD BANK
3811 Eastex Fwy, Houston, TX 77025

IDAHO POTATO COMMISSION
P.O. Box 1068, Boise, ID 83701
Tel: 208-334-2350

IDAHO RETAILERS ASSOCIATION
2228-G Main Boise, ID 83702
Tel: 208-345-0361
Company officials:
Pres. Tim Brenan

ILLINOIS FOOD RETAILERS ASSOCIATION
1919-G S. Highland Ave., Lombard, IL 60148
Tel: 708-627-8100: FAX: 708-627-6106
Company officials:
Pres. R. Hismann
2nd VPres. J. Sullivan
1st VPres. R. Bollettini
Treas. R. Bocchieri
Not for profit trade association representing its members in Illinois. Membership is comprised of 1200 independent retail food stores and 200 associate members consisting of manufacturers, suppliers, wholesalers and brokers.
1990 Meeting: Illinois Food Retailers Association Annual Convention and Trade Show Pheasant Run Resort, St. Charles IL Sept. 30-Oct 3, 1990
Publications: MONTHLY REPORT (newsletter).
THE ILLINOIS FOOD RETAILER (book)

INDEPENDENT BAKERS ASSOCIATION
P.O.Box 3731, Washington, DC 20007
Tel: 202-333-8190
Company officials:
Pres. Robert N. Pyle
Chmn. LeConie (Bud) Stiles
Nat l Affairs Chmn. George Rosenthal
Treas. T. Bowyer
IBA is a national trade organization comprised of over 300 small and medium sized independent wholesale bakeries. IBA represents the legislative, legal and organizational needs of its member bakers and members of allied industries.

1990 Meeting: IBA Spring Board of Directors Meeting The Breakers, Palm Beach, Florida March 18th to 21st 1990
Publications: The Independent (newsletter). Membership Directory

INDIANA RETAIL GROCERS ASSOCIATION
201 N Illinois St. Ste 1720S, Indianapolis, IN 46204
Tel: 317-237-2370: 800: 800-222-4742
Company officials:
CAE Pres. Joseph A. Lackey
Representative of the grocery industry of the state of Indiana. Organization is designed for the purpose of informing promoting and protecting the membership.
1990 Meeting: Midwest Grocers Trade Show Indiana Convention Center-Indianapolis, IN September 8-10 1991
Publications: The Grocers Register: The Indiana Report

INDIANAPOLIS FOOD BROKERS ASSOCIATION
P.O.Box 50872. Indianapolis, IN 46250 Tel: 317-782-8424; FAX: 312-782-8348

INSTITUTE OF FOOD TECHNOLOGISTS
221-G N LaSalle St. Chicago, IL 60601
Tel: 312-782-8424; Fax: 312-782-8348
Company officials:
Pres. Dr. T. Labuza
Pres-Elec: Dr. P. Hopper
Exec Dir: H Mattson
IFT is a non-profit professional scientific society devoted to the discovery of new and application of existing knowledge to improving the world's foods. Its 23.000 members are active in academic, industrial and government organizations.
Publications: Membership Directory, Food Tecnology Magazine, Journal of Food Science

INTERNATIONAL APPLE INSTITUTE
P.O.Box 1137, McLean, VA 22101
Tel: 703-442-8850: FAX: 703-790-0845
Company officials:
Chmn. P. Baker
VChmn. T. Saine
Pres. D. Derr
Secy./Treas. L. Lancaster
The one association serving and representing all of the United States and international apple industry whose goal is : To find consensus solutions to the apple industry's universe of problems.
1990 Meeting: Annual Convention Opryland Hotel, Nashville, TN June 17-20, 1990
Publications: Apple News

INTERNATIONAL ASSOCIATION OF CHAIN STORES
3800 Moore Pl. Alexandria, VA 22305
Tel: 703-549-4525; TWX: 901011; FAX: 703-549-0406
Company officials:
Pres. & CEO: Etienne Laurent
VP: D. Larking-Coste
VP: J. LeRais
N American Rep: S Adamy-McMullen
Publications: COMMUNICATIONS (magazine)

INTERNATIONAL ASSOCIATION OF REFRIGERATED WAREHOUSES
7315 Wisconsin Ave. Ste 1200N. Bethesda, MD 20814
Tel: 301-652-5674; Telex: 898-149; FAX: 301-652-7269

Company officials:
Pres. J. William Hudson
VP & Sec. J. Michael Shaw
Admin Dir. Shirley Von Reichenbach
Members are public refrigerated warehouses in thirty countries, goal is to continue success of the industry in its role as a key factor in the cost effective, quality food distribution.
1990 Meeting: Annual Convention Hyatt
Regency Grand Cypress, Orlando, FL April 22-26 1990
1991 Meeting: Annual Convention Desert Springs Marriott, Palm Desert, CA April 26-30,1991
Publications: Annual Directory of Public Refrigerated Warehouses (International) Cold Facts.

INTERNATIONAL BANANA ASSOCIATION
1101 Vermont Ave NW #306, Washington, DC 20005
Tel: 202-371-1620
Company officials:
Pres. Robert Moore
Sec & Treas. Rosemaria Romero
Publications: WE LOVE BANANA (pamplets)

INTERNATIONAL DAIRY-DELI ASSOCIATION
P.O.Box 5528, Madison, WI 53705
Tel. 608-238-7908
Company officials:
Exec. Dir. Carol L. Christison
IDDA is a food trade Association that serves manufacturers, brokers, distributors, and retailers in the dairy, deli and bakery industries.
1990 Meeting: 26th Annual Dairy-Deli Bake Baltimore, MD 3-5 June 1990
1991 Meeting: 27th Annual Dairy-deli Bake Anaheim, CA 16-18 June 1991
Publications: Annual Trends Analysis, Deli Selling Strategies, Dairy-Deli Bake Digest (monthly newsletter), Wrap-up (quarterly newsletter), UPC Codes for Deli

INTERNATIONAL FOOD ADDITIVES COUNCIL
5775 Peachtree-Dunwoody Rd. Suite 500-D, Atlanta, Ga 30342
Tel: 404-252-3663; Telex: 333437 TKCO Atl; FAX: 404-252-0774
Company officials:
Pres. R. Kellen
Exe. Dir. R. Cristol
Manufacturers of food additives; businesses using food additives. Objectives are to gather and disseminate info on food additives; to represent the industry in governmental affairs; to provide technical and scientific assistance to industry and govt

INTERNATIONAL FOODSERVICE DISTRIBUTORS ASSOCIATION DIV OF NAWGA
201-G Park Washington Ct., Falls Church, VA 22046
Tel: 703-532-9400
Company officials:
Exec. Dir. Gilbert L. Kretzer
An association to provide educational & governmental services for foodservice industry distributors.

INTERNATIONAL FOODSERVICE EDITORIAL COUNCIL
82 Osborne Ln., East Hampton, NY 11937
Tel: 516-324-2725

INTERNATIONAL FOODSERVICE EXECUTIVES ASSOCIATION
111-G E, Wecker Dr., Chicago, IL 60601
Tel: 312-644-6610
Company officials:
Exec VP. Van V Hoffner

An organization dedicated to raising food service industry standards
Publications: Nevada Hospitality, The Food Executive

INTERNATIONAL FROZEN FOOD ASSOCIATION
1764 Old Meadow Lane, Ste 350, McLean, Va 22102
Tel: 703-821-0770; FAX: 703-821-1350
Company officials:
Dir. Gen. Thomas House
Asst. Dir Gen. H. Symons
Processors of frozen foods around the world: Promote frozen foods worldwide
1991 Meeting: International Conference on Frozen Foods The Hague, Netherlands to be determined

INTERNATIONAL ICE CREAM ASSOCIATION
888 16 St NW, Washington, DC 20006
Tel: 202-296-4250
Company officials:
Pres. John F Speer Jr.
Exec VP. E Tipton
Publications: THE LATEST SCOOP (statistics report), MILK FACTS, (statistics report).

INTERNATIONAL INSTITUTE OF FOODS
225-G W Ohio St. Chicago, Il 60610
Tel: 312-670-0200; Telex: 79-7811; FAX: 312-670-0824
Company officials:
Sec./Treas. J.R. Yurkus
An association dedicated to promoting home baking, using self-rising flour and self-rising corn meal.

INTERNATIONAL JELLY & PRESERVE ASSOCIATION
5775-G Peachtree-Dunwoody Rd., Atlanta, GA 30342
Tel: 404-252-0774
Company officials:
Exec. Dir. Barbara Preston
Pres. Robert H. Kellen
The Association is set up to promote and protect the jelly & preserve industry.

INTERNATIONAL MAPLE SYRUP INSTITUTE
643-G Grosvenor, Montreal, PQ, CAN H3Y 2S9
Tel: 514-842-9471; telex: 0556-1996; FAX: 514-842-3541
Company officials:
Exec. Mgr. Claude Tardif
Dir. Alice Switocz
The Institute is set up to promote and protect the pure maple syrup market
1990 Meeting: Boston Oct 1990
1991 Meeting: Montreal Oct 1991
Publications: Newsletter (2/year)

INTERNATIONAL MULTIFOODS
Multifoods Tower, Box 2942, Minneapolis, MN 55402
Tel: 612-340-3755

INTERNATIONAL ASSN OF MILK, FOOD & ENVIRONMENTAL SANITARIANS
502 E. Lincoln Way, P.O.Box 701, Ames, IA 50010
Tel: 515-232-6699; Telex: 515-232-4736
Company officials:
Exec. Mgr. Steve K. Halstead
1990 Meeting: 77th IAMFES Annual Meeting Woodfield Hilton & Towers, Arlington Heights, IL August 5-9 1990

1991 Meeting: 78th IAMFES Annual Meeting Galt House, Louisville, Kentucky July 21-25 1991

IOWA FOOD INDUSTRIES ASSOCIATION
2894-G 106 St. Des Moines, IA 50322
Tel: 515-270-2628
Company officials:
Exec Dir. Trish Smallenberger
To promote and protect the Iowa food industry

IRISH EXPORT BOARD
320 Park Ave. 26 Fl., New York, NY 10022
Tel. 212-371-3600

ITALIAN FOODS AND WINE INSTITUTION
1 World Trade Center 2253, New York, NY 10048
Tel: 212-432-2000

ITALIAN TRADE COMMISSION
499 Park Ave., New York, NY 10022
Tel: 212-980-1500

J.L.M. INDUSTRIES, INC.
22-G Gatehouse Rd., Stamford, CT 06902
Tel: 203-348-3300

KANSAS FOOD DEALERS ASSOCIATION INC
2809-G West 47, Shawnee Mission, KS 66205
Tel: 913-384-3838
Company officials:
VP. Mike Donelan
Pres. Leonard McKinzie
Publications: KANSAS FOOD NEWS (magazine)

KENTUCKY GROCERS ASSOCIATION
1939-G Goldsmith Lane, #134, Louisville, KY 40218
Tel: 502-459-7111
Company officials:
Pres. Patrick K. Hicks
864 companies - approx. 1800 store locations.
1990 Meeting: KGA Convention & Trade Show Lexington, KY August 23, 24, 25, 1991
Publications: Monthly Newsletter: "Grocers By Word". Twice yearly magazine: "Kentucky Grocer".

LA SALLE PROCESSING ASSOCIATION
Box 97, La Salle, MN 56056
Tel: 507-375-3408
Company officials:
Pres. Steve Cunningham
VP. M. Bramdtr

LEONARD, JOHN, R., CO.
c/o John R. Leonard Co. 16150-G Brook Park Rd., Cleveland, OH 44135
Tel: 216-267-2205; TWX: 810-421-8842

LINDSAY FRUIT ASS'N
P.O.Box 930, Lindsay, CA 93247
Tel: 209-562-1327

LOUISIANA RETAIL FOOD DEALERS ASSOCIATION INC
1920 Shrewabury Road, Metairie, LA 70001
Tel: 504-885-2299

LOUISIANA SHRIMP ASSOCIATION
2401 Manson St, Ste C, Metairie, LA 70001
Tel: 504-885-7110
Company officials:

Pres. Andrew Martin
Exec Sec & Treas. Charlie Lyles

MAGAZINE & PAPERBACK MARKET INSTITUTE
4000-G Coolidge Ave. Baltimore, MD 21229
Tel: 301-525-3355
Company officials:
Exec VP. Don DeVito
Publications: THE MPMI MONTHLY NEWSLETTER, THE MARKET PLACE (newsletter)

MAINE DAIRY PROMOTION BOARD
State House, Station #97, Augusta, ME 04333-0097
Tel: 207-289-3621

MAINE GROCERS ASSOCIATION
1 Weston Ct. P.O.Box 5460, Augusta, ME 04332
Tel: 207-622-4461
Company officials:
Pres. Wm Bird
VP. Frank Frisbe
VP. Everett Johnson

MAINE LOBSTERMEN'S ASSOCIATION
P.O.Box 147, Damariscotta, ME 04543
Tel: 207-563-5254
Company officials:
Pres. Edward Blackmore
VP. Brian McLaim

MAINE SARDINE PACKERS ASSOCIATION
P.O.Box 337, Brewer, ME 04412
Tel: 207-989-2180; FAX: 207-989-2154
Company officials:
Pres. Peter Boyce
Sec. Treas. Jeffrey H. Kaelin
Organized for the purpose of establishing an agency for cooperative action to promote the general welfare of the Maine sardine industry and to improve conditions under which the industry is conducted.

MANUFACTURERS REPRESENTATIVES OF AMERICAN INC
P.O.Box 150229, Arlington, TX 76015
Tel: 817-465-5511
Company officials:
Exec. Dir. W. Bess
Pres. R. Gage
VP & Pres-Elect. R. Doane
An association of independent manufacturers representatives in paper, plastic, & cleaning maintenance supplies.

MARASCHINO CHERRY & GLACE FRUIT PROCESSORS
177-G Main St., Box 776, Matawan, NJ 07747
Tel: 201-583-0798
Company officials:
Pres. Fred Good
Exec. VPres. Richard J. Sullivan
VPres. Henry Orsi
To promote the consumption of maraschino cherry & glace fruit processors trade, commercial and business interests of its members, to establish and maintain uniformity and certainty in the customs and commerciai usages of the industry, to seek uniformity of ail state laws with the federal laws governing the sale of maraschino cherry & glace fruit products of the industry and to arbitrate in a friendly manner difficulties affecting its members, ail of which not being inconsistent with the public good
1990 Meeting: Maraschino Cherry Convention Longboat Key Club, Longboat Key, Florida April 22-24th, 1990

Publications: (Annual) Association of Food Industries 89: AFI Newsletter

MASSACHUSETTS FOOD ASSOCIATION
31 Milk St, Ste 817, Boston, MA 02109
Tel: 617-542-3085
Company officials:
Pres. Milt Segel
Asst to Pres. Christopher Flynn
An association of retailers, brokers, manufacturers, distributors, processors, service companies
Publications: Foodlines (monthly newsletter)

MCDANIEL, R. E., CO.
2931 Apache Trail, Nashville, TN 37113
Tel: 615-333-3261
Company officials:
Pres. Jerry Brinkley
Sec. J. Hall

METROPOLITAN FOOD BROKERS
177-G Main St., P.O.Box 776, Matawan, NJ 07747
Tel: 201-583-8188; Telex: 21-9262 TLXUR: FAX: 201-583-0798
Company officials:
Exec VP. Richard J. Sullivan
To encourage and foster increased efficiency and capacity in the performance of the food broker's function, to cooperate with government in this effort to prevent and to abolish unfair and deceitful trade practices, to establish in the food industry and in the general public a better understanding of the essential character and economy of the traditional food broker's function.
Publications: Association of Food Industries "89". -(Annual); AFI Newsletter.

METROPOLITAN FOOD DEALERS ASSOCIATION
P.O. Box 2288, St. Louis, MO 63109
Tel: 314-481-2117
Company officials:
Pres. David O'Neil
Publications: METRO FOOD DEALER (magazine)

MIATCO
820-G Davis St., Evanston, IL 60201
Tel: 708-866-7300
N° of employees: 1-9

MICHIGAN APPLE COMMITEE
13105 Schavey Rd., Ste 5, DeWitt, MI 48820
Tel: 517-669-8353

MICHIGAN BEAN SHIPPERS ASSOCIATION
Box 6008, Saginaw, MI 48608
Tel: 517-790-3010; Telex: 810-265-0100; FAX: 517-790-3747
Company officials:
Pres. J A MCGill
Publications: MICHIGAN DRY BEAN DIGEST (magazine)

MICHIGAN FOOD PROCESSORS ASSOCIATION
P.O.Box 1827, Holland, MI 49422-1827
Tel: 616-396-4315
Company officials:
Exec Dir. Carl S. Landis
Pres. H McDonald
1st VP. A. Wendzel
2nd VP. K. Morrison
Publications: Annual Directory, Newsletter

MICHIGAN GROCERS ASSOCIATION
221 N Wainut, Landing, MI 48933
Tel: 517-372-6800
Company officials:
Pres. Paul Fershes
Admin VP. Mike Hanelan

Publications: MICHIGAN FOOD DEALERS (newsletter)

MID-ATLANTIC FOOD DEALERS ASSOCIATION
14 Commerce St. Baltimore, MD 21222
Tel: 301-285-6777
Company officials:
Pres. Wm P. Miller
VP. K. Briley

MID-ATLANTIC FOOD PROCESSORS ASSOCIATION INC
P.O.Box 2497, Salisbury, MD 21801
Tel: 301-546-5854
Company officials:
Exec VP & Sec. Franklin Schales
Educational, information & service
1990 Meeting: Ocean City, Maryland Nov. 19-20, 1990
1991 Meeting: Nov 25-26, 1991
Publications: Buyers' Guide & Directory (published yarly with ads), General Bulletin, Monthly, no ads.

MID EAST UNITED DAIRY INDUSTRY ASSOCIATION
3592 Corporate Dr., Ste. 114, Columbus, OH 43231
Tel: 614-890-1800

MIDLAND UNITED DAIRY INDUSTRY ASSOCIATION
101-G NE Trilein/Dairy Building, Ankeny, IA 50021-2098
Tel: 515-964-0696

MIDLAND UNITED DAIRY INDUSTRY ASSOCIATION
11330-G Q' St., Omaha, NE 68137
Tel: 402-592-8080

MIDLAND UNITED DAIRY INDUSTRY ASSOCIATION
22-G Willow Way, St. Charles, MO 63303
Tel: 314-441-2959

MIDLAND UNITED DAIRY INDUSTRY ASSOCIATION
4707-G College Blvd., Leawood, KS 66211
Tel: 913-345-8989

MIDWEST BROKERAGE
P.O.Box 6304, Grand Rapids, MI 49516-6304
Tel: 616-455-1250
Company officials:
Pres. Ralph Hauenstein
VP. Chuck Westers
Treas: Al Greeson
Sec. Mark Schrotenboer

MIDWEST DELI & BAKERY MERCHANDISERS ASSOCIATION
333-G N. Michigan Ave., Chicago, IL 60601
Tel: 312-332-1601

MIDWEST FOOD PROCESSORS ASSN INC
P.O.Box 1297, Madison, WI 53701
Tel: 608-255-9946; FAX: 608-255-9838
Company officials:
Exec.Dir. Donald L. Stone
Adm Asst. J. Turk
Vegetable Processors of Illinois, Minnesota & Wisc. Full Association-Education, Research Direction. Legislative Representation & Administrative Agency Liasion
1990 Meeting: Annual Meeting & Expo Milwaukee, WI Oct. 29-30-31, 1990
Publications: Semi Monthly Bulletin. Directories of Members & Association to members in good standing.

MIDWESTERN FROZEN FOOD ASSOCIATION
333-G N. Michigan Ave., Chicago, IL 60601
Tel: 312-332-1601

Company officials:
Exec Dir. James C. Alexander

MILK INDUSTRY FOUNDATION & INT'L ICE CREAM ASSN
888 16th St NW, Washington, DC 20006
Tel: 202-296-4250; FAX: 202-331-7820
Company officials:
Pres. E Tipton
Represent milk processors & ice cream manufacturers.

MILK PROMOTION SERVICES INC
381 Governor's Highway, South Windsor, CT 06074-2598
Tel: 203-289-3383

MILK PROMOTION SERVICES OF INDIANA
9360 Castlegate Dr., Indianapolis, IN 46256
Tel: 317-842-7133

MILLERS NATIONAL FEDERATIONS
600 Maryland Ave SW, #305W, Washington DC 20024
Tel: 202-484-2200
Company officials:
Director Industry Rels: Paul B. Green

MINNESOTA DAIRY PROMOTION COUNCIL
2015-G Rice St., St. Paul, MN 55113-6891
Tel: 612-488-0261

MINNESOTA GROCERS ASSOCIATION
533-G St. Clair Ave., St. Paul, MN 55102
Tel: 612-228-0973
Company officials:
Pres. Joel Holland
The Minnesota Grocers Association is a non profit, voluntary membership organization committed to promoting and advancing the common interests and enhancing the mutual understandings and relationships of grocers to best serve the consuming public
1990 Meeting: Minnesota Grocers Association Annual Convention & Exhibition Minneapolis Convention Center October 20-22. 1990
1991 Meeting: Minnesota Grocers Association Annual Convention & Exhibition Minneapolis Convention Center October 19-21, 1991
Publications: MINNESOTA GROCER Magazine (bi-monthly); FRONTLINE Newsletter (bi-monthly); Grocer Industry Directory (yearly).

MISSISSIPPI WHOLESALE GROCERS' ASSOCIATION
455-G N. Lamer, #414, P.O.Box 3667, Jackson, MS 39207
Tel: 601-352-6413
Company officials:
Pres. W. Ferguson
VPres. L. McCool
Exec. Sec. Helon H. Rees
To protect, promote, foster and advance the groceries, grocery sundries and products; to increase the use of their products; to imporve the conditions under which the industry is carried on; to develop fair and just competitive methods; to perfect machinery for the peaceful settlement of disputes between members, or between them and their employees or customers; to protect the industry against unfair and unjust burdens and actions; to collect and disseminate pertinent data relating to the industry; and generally to do such things as may be necessary to the foregoing results

1990 Meeting: Perdido Beach Hilton,-Orange Beach, Alabama August 15-18, 1990
1991 Meeting: Perdido Beach Hilton,-Orange Beach, Alabama August 7-10, 1991

MISSOURI GROCER'S ASSOCIATION
1910-G E. Meadowmere, Box 10223
Tel: 417-831-6667
Company officials:
Exec Dir. George H. Dillard
Members are made up of Retail Grocers throughout Missouri and also the manufacturers and suppliers to the food industry. The organizations main goals are to support and unit the retail grocers of Missouri
1990 Meeting: Missouri Grocers Association Annual Convention and Food Trade Show Marriott's Tan-Tar-A Resort, Osage Beach., Missouri October 20-22, 1990
Publications: Missouri Grocer - published monthly

MONTANA FOOD DISTRIBUTORS ASSOCIATION
2700-G Airport Way, Unit A, Box 5775.
Helena, MT 59604
Company officials:
Pres. J. Clifford
VP. D. Kent
Sec. W. Stevens
Treas. D. Clark
Publications: FOOD DISTRIBUTOR (magazine)

MUSHROOM COOPERATIVE CANNING CO.
Birch St. Box 389, Kennett Square, PA 19348
Tel: 215-444-1400
UPC 70532

MUSHROOM GROWERS COOPERATIVE ASSOCIATION OF PENNSYLVANIA
225-G Birch St, Kenneth Square, PA 19348
Tel: 215-444-3910
Company officials:
Pres. R. Yatman
VPres. R. Pratt

NATIONAL AMERICAN WHOLESALE GROCERS' ASSOCIATION
201-G Park Washington Ct., Falls Church, VA 22046
Tel: 703-532-9400
Company officials:
Pres. J. R. Block
Opera Sery VP. J. R. Bloom
ISDA VP & Exec. G. L. Kretzer
Industry Relations, VPres. P. Schulz

NATIONAL ASSOCIATION FOR THE SPECIALTY FOOD TRADE, INC.
215 Park Ave S. Ste 1606, New York, NY 10003
Tel: 212-505.1770; 800-800-255-2502
Company officials:
Exec Dir. Jeanne Maraz
Comm Dir. Ronald Tenner
Publications: NASFT SHOWCASE (magazine), RD TRENDS (newsletter)

NATIONAL ASSOCIATION FOR THE SPECIALTY FOOD TRADE, INC.
215-G Park Ave. South, New York, NY 10003

NATIONAL ASSOCIATION OF CONVENIENCE STORES
1605-G King St., Alexandria, VA 22314-2792
Tel: 703-684-3600
Company officials:
Pres. & CEO. Kerley LeBeouf

Education & Research VP. Richard J. Levin CAE
Government Relations VP. Teri Richman
Expositions & Meetings VP. Nancy P. King
The mission of NACS is to assist members in increasing their business effectiveness and profitability by:
1. Providing needed education, training and an exchange of ideas;
2. Encouraging a high level of business ethics and a positive image for the industry;
3. Encouraging governmental action beneficial to the industry through the active participation of its membership.
1990 Meeting: Convention/Exposition Dallas, Texas, September 23-26, 1990
1991 Meeting: Convention/Marketplace, Orlando, Florida November 3-6, 1991
Publications: NACS SCAN; Fact Book; Washington Report: Compensation Survey; State of the Convenience Store Industry Report

NATIONAL ASSOCIATION OF FOOD & BEVERAGE RECRUITERS
P.O.Box 682, Cherry Hill, NJ 08003
Tel: 201-329-0099

NATIONAL ASSOCIATION OF FOOD EQUIPMENT MANUFACTURERS
111-G E. Wecker Dr., Chicago, IL 60601
Tel: 312-644-6610; Telex: 62896249; FAX: 312-565-4658
Company officials:
Exec VP. William W Carpenter
1991 Meeting: NAFEM/91 Georgia World Congress Center, Atlanta Oct. 12-15, 1991

NATIONAL ASSOCIATION OF FRUITS, FLAVORS & SYRUPS INC
177-G Main St., Box 776, Matawan, NJ 07747
Tel: 201-583-8272; FAX: 201-583-0798
Company officials:
Exec. Dir. Richard J. Sullivan
Pres. John Cassens
The National Association of Fruits, Flavors, and Syrups is a broad based trade association of manufacturers, processors, and suppliers of fruits, flavors, syrups, stabilizers, emulsifiers, colors, sweeteners, cocoa, and related food ingredients. Its purpose is to explore emerging technologies in food processing, changing management systems, legislative and regulatory matters, market requirements, and personnel developments.
1990 Meeting: NAFFS Annual Convention Longboat Key Club, Longboat Key, Florida Sept. 23-26, 1990
Publications: NAFFS 1989 Yearbook - 71st Annual Convention Proceedings Newsletter.

NATIONAL ASSOCIATION OF HOSIERY MANUFACTURERS
447-G S Sharon Amity Rd. Charlotte, NC 28211
Tel: 704-365-0913; FAX: 704-362-2056
Company officials:
Pres. Sid Smith
An association whose goal is to promote & maintain economic well-being of US hosiery industry.
Publications: HOSIERY NEWS (monthly) magazine), NAHM'S DIRECTORY OF HOSIERY MANUFACTURERS, ANNUAL BOOK OF HOSIERY STATISTICS

Company officials:
Assoc Dir. B. Jones
Exec Dir. C Ehrhart

NATIONAL ASSOCIATION OF MARGARINE MANUFACTURERS
1101-G Fifteenth St. NW. Washington, DC 20005
Tel: 202-785-3232 FAX 202-223-9741
Company officials:
Pres. R. Kellen
Exec Dir. C. Ehrhart
Assoc. Dir. B. Jones
Manufacturers & distributors of margarine, suppliers. To represent members' legislative regulatory interests, develop, coordinate & supply the public with accurate data on margarine products.

NATIONAL ASSOCIATION OF MEAT SURVEYORS
8365-G Greenboro Dr., McLean, Va 22102
Tel. 703-827-5754

NATIONAL ASSOCIATION OF PIZZA OPERATORS
P.O. Box 114, Santa Claus, IN 47579
Tel: 812-937-4464

NATIONAL ASSOCIATION OF SPECIALTY FOOD & CONFECTION BROKERS
6501-G Poco Ct., Fort Worth, TX 76133
Tel: 817-292-8495; FAX: 817-292-8489
Company officials:
Pres. D. Mullen
VP & Treas: L. Burgess
Sec. J. Yates
An association of specialty food brokers sharing common business interests working together to foster the specialty food business working closely with the National Association for the Specialty Food Trade who together are instrumental in bringing epicurean food to the dining room table
1990 Meeting: National Association of Specialty Food and Confection Brokers in Conjunction with the National Assn, for Specialty Food Trade March 4, 1990 (meeting room not decided) Moscone Convention Ctr., S.F., CA July 8, 1990 (meeting room not decided) Javita Conv. Ctr., N.Y. City
1991 Meeting: Nationai Association of Specialty Food and Confection Brokers in Conjunction with the National Assm, for Specialty Food Trade March 3, 1991 (meeting room not decided) San Diego Conv. Ctr. July 7, 1991 (meeting room not decided) Javita Conv. Ctr., N.Y. City
Publications: Directory only

NATIONAL ASSOCIATION OF STORE FIXTURE MANUFACTURERS
5975-G W. Sunrise Blvd., Sunrise, FL 33313
Tel: 305-587-9190
Company officials:
Exe.Dir. Robert L Strauss
Promotion of common business interests of store, bank and office fixture manufacture
1991 Meeting: 36th Annual Convention The Phoenician Hotel, Scottadale, Arizona Ma 20-22, 1991
Publications: NASFM News; Specifications: The Manufacture of Store Fixtures
SIC 2541, 2542. N° of employees: 175

NATIONAL ASSOCIATION OF TOBACCO DISTRIBUTORS
1199-G N Fairfax St., Alexandria, VA 223
Tel: 703-683-8336; 800: 800-642-NATD: FAX: 703-683-5987

Company officials:
Exec. VP. Terry Burns
National trade assn, representing wholesalers/distributors/manufacturers of tobacco, confectionery, snack food & allied products
1991 Meeting: Annual Marketing Conference & Exposition Marriott Rivercenter, San Antonio Apr. 24-28, 1991
Publications: DMA Magazine; Update Newsletter

NATIONAL ASSOCIATION OF WHOLESALER-DISTRIBUTORS
1725-G "K" St NW, Washington, DC 20001 Tel: 202-872-0885
Company officials:
Pres. Dick Van dongen
Publications: NAW REPORTS (newsletter)

NATIONAL AUTOMATIC MERCHANDISING ASSOCIATION
20-G N Wacker Dr., Chicago, IL 60606
Tel: 312-346-0370; FAX: 312-704-4140
Company officials:
Pres. J. Rost
Asst Sec./Treas. J. James
N A M A is the national trade association of the merchandise vending and contract foodservice management business. Its membership comprises service companies, equipment manufacturers and suppliers of products and services to these businesses. Services to members include, but are not limited to government affairs/legislation, education, employee relations, industry statistics National and Western convention and trade show and numerous specialized conferences.
1990 Meeting: National Convention and Exhibit Orlando Convention Center, Orlando, Florida October 11-14, 1990
1991 Meeting: National Convention & Exhibition Anaheim Convention Center, Anaheim, CA, April 19-21, 1991
Publications: Annual NAMA Members Directory, $100.00 nonmembers, $8.00 members, Annual Operating Ratio Report, $200.00 nonmembers, $50.00 to members.

NATIONAL BROILER COUNCIL
1155 15 St. NW, Ste 614, Washington, DC 20005
Tel: 202-296-2622; FAX: 202-293-4005
Company officials:
Pres. George Watts
National Trade Association representing the poultry industry
Publications: National Broiler Council, Washington Report, Weekly newsletter.

NATIONAL CANDY BROKERS ASSOCIATION
P.O.Box 486, North Andover, MA 01845
Tel: 508-685-3893
Company officials:
Bd. Chmn. J. Young
Pres. P. Johnson
Exec. VPres. E. Bjornson
Publications: The Candy Dish Newsletter

NATIONAL CANDY WHOLESALERS ASSOCIATION INC
1120 Vermont Ave NW Ste, 1120, Washington, DC 20005
Tel: 202-463-2124
Company officials:
Pres. Duane Riedel
Publications: CANDY WHOLESALER

(magazine), QUICK TOPICS (newsletter)

NATIONAL CHEESE INSTITUTE INC
888-G Sixteenth Street, N.W., Washington, DC 20006
Tel: 202-659-1454; FAX: 202-659-1496
Company officials:
Exec. Dir. Floyd Gaibler
Pres. George Cornell
The National Cheese Institute is a non-profit corporation whose members include independent and cooperative manufacturers, processors, packagers, and distribution of cheese and related products. The Institute provides assistance through the dissemination of general, technical and promotional information. The Institute remains current on technical matters and communicates recommendations on legislative and regulatory policy issues.
1991 Meeting: ABI/NCI Combined Annual Meeting Chicago Marriott Downtown April 8-9, 1991
Publications: ABI/NCI Newsletter

NATIONAL COFFEE ASSOCIATION OF USA INC
110 Wall St. New York, NY 10005
Tel: 212-344-5596
Company officials:
Pres. George E. Boeklin
Publications: THE NEWSLETTER (newsletter)

NATIONAL CONFECTIONERS ASSOCIATION OF THE US, INC
7900-G W. Park Dr., McLean, VA 22102
Tel: 703-790-5750

NATIONAL DAIRY COUNCIL
6300-G N. River Rd., Rosemont, IL 60018
Tel: 708-696-1020; FAX: 708-696-1033
Company officials:
Ph.D., Pres. M. F. Brink
M.A., R.D., Sr. VPres.-Nut. Ed & Res. Anita L. Owen
National Dairy Council is a subsidiary of United Dairy Industry Association (UDIA) which, in turn, is a federation of state and regional promotion organizations primarily funded by dairy farmers to promote the increased sales and consumption of real, domestically produced milk and milk products. NDC is the nutrition research and nutrition education arm of UDIA.
1990 Meeting: Annuai Meeting Salt Lake City, Utah September 20-21, 1990
Publications: Dairy Council Digest: Nutrition News; Nutrition Education Materials Catalog

NATIONAL DAIRY PROMOTION AND RESEARCH BOARD
2111 Wilson Blvd., Ste. 600, Arlington, VA 22201
Tel: 703-528-4800

NATIONAL FEDERATION OF COFFEE GROWERS OF COLOMBIA
140 E 57 St. New York, NY 10022
Tel: 212-421-8300; Telex: RCA 232279; FAX: 212-371-3489
N° of employees: 30

NATIONAL FISHERIES INSTITUTE
2000-G "M" St., N.W., Suite 580, Washington, DC 20036
Tel: 202-296-3426
Company officials:
Exe VP. Lee Weddig
Trade Association
1990 Meeting: NFI Annual Convention San Francisco Marriott, San Francisco, CA Nov 4-7, 1990

1991 Meeting: NFI Annual Convention New Orleans, LA Oct 30-Nov 2, 1991

NATIONAL FOOD BROKERS ASSOCIATION
1010 Massachusetts Ave. N.W., Washington, DC 20001
Tel: 202-789-2844
Company officials:
Acting Pres. CEO. M. Singer
Sr. VPres. Mktg. M. Baum
Dir of vovt relations & staff legal counsel. M.L. Garmon
Dir. Convention servs. M. Weekley
Dir. Membership. D. Haropulos
Dir of communicatios. H. Hallden
Dir of Oper. J. Crawford
Staff Asst. NFBA Educ & Training Foundation. A. Mangum
Food brokers in U.S. & abroad
Publications: Food Broker Quarterly Magazine NFBA Membership Directory

NATIONAL FOOD DISTRIBUTORS ASSOCIATION
111-G E. Wacker Dr., Chicago, IL 60601
Tel. 312-644-6610
Specialty food store-door service distributors and their suppliers.
1990 Meeting: Annual Convention & Trade Show Anaheim, CA Jul. 15-17, 1990
1991 Meeting: Mid Winter Florida Feb. 1-3. 1991

NATIONAL FOOD SERVICE ASSOCIATION
3010 Sunset Dr., Columbus, OH 43216
Tel: 614-263-3346

NATIONAL FROZEN FOOD ASSOC. INC
604 W. Derry Rd., BOX 398, Hershey,PA 17033
Tel: 717-534-1601; FAX: 717-533-6370
Company officials:
Pres. Nevin B. Montgomery
To promote and sell more frozen food. NFFA organizes industry promotion programs, research and education to achieve this goal.
1990 Meeting: National Frozen Food Convention & Expo San Francisco, CA Oct 14-17, 1990
1991 Meeting: National Frozen Food Convention & Expo Orlando, FL Oct. 6-9, 1991
Publications: Frozen Food Executive
Magazine: Membership Directory; Panguin Pipeline Newsletter

NATIONAL FROZEN PIZZA INSTITUTE
1764 Old Meadow Ln. Suite 350, McLean, Va 22102
Tel: 703-821-0770
Company officials:
VP. Dick Miller

NATIONAL GROCERS ASSOCIATION
1825-G Samuel Morse Dr., Reston, VA 22090
Tel: 703-437-5300; FAX: 703-437-7768
Company officials:
Pres. T. Zaucha
Sr. VPres./Gen. Counsel. T. Wenning
Sr. VPres. R. Brown
The National Grocers Association is the national trade association with over 2.600 members operating over 50.000 stores in the small business sector of the food distribution industry. Retail and wholesale grocers hold full membership in N.G.A., sixty state/local associations and 105 manufacturer/suppliers old associate membership in N.G.A.

1991 Meeting: 1991 Convention & Buying/Merchandising Expo New Orleans. LA Jan 28-31, 1991
Publications: National Grocer Quarterly Magazine; National Grocer Monthly Digest.

NATIONAL HONEY PACKERS AND DEALERS ASSOC
P.O.Box 776, Matawan, NJ 07747
Tel: 201-583-8188; FAX: 201-583-0798
Company officials:
Exec. Dir. R. Sullivan
Pres. R. Appel
to keep the membership informed in a timely way of rules and regulations that affect its business, to maintain ongoing contacts with government officials who regulate any aspect of the honey industry, to respond to newspaper or consumer requests for information on honey or the honey industry
Publications: Association of Food Industries 89 (Annual); AFI Newsletter

NATIONAL HOUSEWARES MANUFACTURERS ASSOCIATION
1324-G Merchandise Mart, Chicago, IL 60654
Tel: 312-644-3333: Telex: 706804
Company officials:
Pres. Jay Sapaulding
NHMA is a full service, not-for-profit trade organization serving the housewares industry
Publications: DIRECTORY OF EXHIBITORS (directory), MARKETING RESEARCH STUDY OF THE HOUSEWARES INDUSTRY (study), FORETHOUGHT (newsletter)

NATIONAL INDEPENDENT DAIRY FOODS ASSOCIATION
321-G "D" St. N.E., Washington, Dc 20002
Tel: 202-543-3838
Company officials:
Exec VP & Gen Counsel. Don Randall
Assure that federal laws and regulations do not discriminate against independent propritiary dairy processors and handlers.
Equity in milk marketing regulations.

NATIONAL INDEPENDENT POULTRY & FOOD DISTRIBUTOR ASSN
404 BNA Dr., Nashville, TN 37217
Tel: 615-360-3901

NATIONAL INSTITUTIONAL FOOD DISTRIBUTOR ASSOCIATES
280 Interstate Parkway North, Atlanta, Ga 30325
Tel: 404-952-0871
Company officials:
Pres. Shannon Talley
Sales VP. Dan Kraft

THE NATIONAL KRAUT PACKERS ASSOCIATION INC
P.O.Box 606, Saint Charles, IL 60174
Tel: 708-584-8950
Company officials:
Pres. Jesse Eisenberg
Publications: KRAUT LETTER (news bulletin)

NATIONAL LIVESTOCK & MEAT BOARD
444-G N Michigan Ave. Chicago, IL 60611
Tel: 312-467-5520

NATIONAL PASTA ASSOCIATION
1901-G N. Ft. Myer Dr., #1000, Arlington, VA 22209

Tel: 703-841-0818; FAX: 703-528-6507
Company officials:
Pres. J.M. Lichtenburg
VPres. J. Kinnaird
To promote the consumption of U.S. made pasta and represent our members as well as providing other membership services
Publications: Directory-Pasta Industry
Pasta-Newsletter, Pasta Journal-Industry Magazine

NATIONAL PEANUT COUNCIL, INC
1500-G King St., Alexandria, VA 22314
Tel: 703-838-9500; Telex: 440497 NPCDC; TWX: 703-838-9508; FAX: 703-838-9508
Company officials:
Pres. E. Ashdown
Dir/Int'l Mktg. J. Anderson
Dir/Industry Svcs. K. Cutchins
Members consist of growers, shellers, manufacturers of peanuts and peanut products, special processors, brokers, allied businesses associated with the peanut industry, and international brokers, shellers and manufacturers. Council objectives are to promote peanuts and peanut products, stimulate research, provide general information & maintain membership cooperation for the entire peanut industry.
1991 Meeting: 51st Annual (Convention) Meeting The Westin La Paloma April 2-5, 1991
Publications: Membership Directory (Annual); "Peanut News" Letter (monthly); Peanut Industry Guide (Bi-Annual).

NATIONAL PECAN SHELLERS ASSOCIATION
5775 Peachtree-Dunwoody Rd. Ste 500D,
Atlanta, GA 30342
Tel: 404-252-3663; Telex: 33-3437 TKCO; FAX: 404-252-0774
Company officials:
Exec Dir. Larry Davenport
Pres. Robert H. Kellen
An association of pecan shellers & processors whose goal is to promote the welfare & interests of the pecan-shelling & processing industry.

NATIONAL PREPARED FROZEN FOOD ASSOCIATION INC
1415 Queen Anne Rd. Teaneck, NJ 07666
Tel: 201-837-8200

NATIONAL RESTAURANT ASSOCIATION
1200-G 17th St. N.W., Washington, DC 20036
Tel: 202-331-5900; FAX: 202-331-2429
Company officials:
Pres & Bd. Chmn. H.H. Rustizky
Exec. VPres. William P. Fisher
VPres. M. Hurst
Treas. John Farquharson
Corp. Sec. LaVerne Warlick
Leading National Trade Association representing the foodservice industry. Three main objectives: 1) Promote and protect industry in the federal legislature and regulatory realms.
2) Promote foodservice to the public at large and to the industry itself.
3) Provide educational programs to members to upgrade the industry
1991 Meeting: NRA Annual Convention McCormick Place, Chicago, Illinois May 18-22, 1991
Publications: Restaurants USA (monthly); Washington Weekly (weekly).

NATIONAL SINGLE SERVICE FOOD ASSOCIATION
5775 Peachtree-Dunwoody Rd, Ste 500D, Atlanta, GA 30342
Tel: 404-252-3663; Telex: 33-3437 TKCO ATL; FAX: 404-252-0774
Company officials:
Pres. Robert H. Kellen
Exec. Dir. Richard E. Cristol
An association of packers of single service food whose goal is to establish & maintain standards of excellence of industry products

NATIONAL SOFT DRINK ASSOCIATION
1101 16 St NW, Washington, DC 20236
Tel: 202-463-6732
Company officials:
Pres. Fred Webber
Sec. Donald Prescott
Publications: DATELINE (newsletter)

NATIONAL TURKEY FEDERATION
11319 Sunset Hills, Reston, VA 22090
Tel: 703-435-7206
Company officials:
Pres. J. Wickliffe
Exec. VP. S. Proctor
Publications: NATIONAL TURKEY FEDERATION NEWSLETTER

NATIONAL WOODEN PALLET & CONTAINER ASSOCIATION
1625 Massachusetts Ave NW, Ste 200,
Washington, DC 20036
Tel: 202-667-3670
Company officials:
Pres. Paul A. Frank Jr.
Pres-Elect. Mary Mayor
Publications: THE NEWSLETTER

NEBRASKA RETAIL GROCERS ASSOCIATION
6509-G Irvington Rd. Omaha, NE 68122
Tel: 402-572-8991
Company officials:
Pres. George Prucha
Chmn. Al Middleton
Publications: NEBRASKA RETAILER (magazine)

NEW ENGLAND DAIRY AND DELI ASSN. INC
420-G Washington St., Braintree, MA 02184
Tel: 617-849-1334; FAX: 617-849-0821
Company officials:
Exec. Director. Andrea Walker
Pres. William T. Lyons
To sponsor activities and services that further promote the sale of dairy-deli-bakery products in New England.
1991 Meeting: NEDDA Annual Taste Show & Seminar Brayaide Exposition Center, Boston, MA April 16-17, 1991
Publications: NEDDA News

NEW ENGLAND FOOD BROKERS ASSOCIATION INC
118 Pleasant St. Arlington, MA 02174
Tel: 617-648-8200
Company officials:
Pres. Rick Daly

NEW ENGLAND WHOLESALE MEAT DEALERS ASSOCIATION
751-G Main St. Waltham, MA 02154
Tel: 617-891-5603
Company officials:
Pres. Joseph Furpado
Publications: DIRECTORY OF THE NEW ENGLAND MEAT TRADE

NEW HAMPSHIRE RETAIL GROCERS ASSOCIATION
110-G Stark St., Manchester, NH 03101
Tel: 603-669-9333; FAX: 647-0833
Company officials:
Pres. Hohn M. Dumais
Chrmn. J. Dixon
V Chrmn. C. Butson
V Chrmn. M. Kashulines
V Chrmn. F. Jean
Treas. B. Cricenti
Membership consists of independent and chain store grocers who operate convenience stores, markets and supermarkets and their suppliers, NHRGA is a non-profit trade association dedicated to excellence in serving its membership through communication, education and legislation.
1991 Meeting: Annual Convention and Trade Show April 26-28, 1991
Publications: News & Food Report Magazine; News & Food Report Management Newsletter, Scanning the Industry; Who's Who in NH Food Industry (Annual)

NEW JERSEY FOOD COUNCIL
30-G W. Lafeyette St., Trenton, NJ 08608
Tel: 609-392-8899; FAX: 609-396-6571
Company officials:
Pres. Barbara McConnell
Publications: EXPRESSLINE (newsletter)

NEW MEXICO FOOD DEALERS ASSOCIATION
4010-G Carlisle N.E., Ste. A. Albuquerque, NM 87017
Tel: 505-888-1812
Company officials:
Pre. Truett Gill
Bd Chmn. John Brooks
1990 Meeting: Albuquerque Convention Center October 12-13-14, 1990
Publications: NEW MEXICO FOOD DEALER (magazine), CHECKOUT (newsletter)

NEW YORK STATE CHEESE MANUFACTURERS ASSOCIATION
C/O Cornell University 11 Stocking Hall, Ithaca, NY 14853
Tel: 607-255-3027

NEW YORK STATE FOOD MERCHANTS ASSOCIATION INC
111-G Washington Ave., Albany, NY 12210
Tel: 518-434-1900; FAX: 518-434-9962
Company officials:
Pres & CEO. James T. Rogers
The New York State Food Merchants Association is a retail and wholesale trade association representing the interests of New York State's approximately 23.000 food stores. Our membership includes the full scope of food distribution - ranging from large supermarket chains to small independent grocers, food coops and wholesalers. The industry employs over 170.000 New Yorkers and has annual sale over 21 billion dollars. The primary purpose of the Association is to represent food retailers in state and local governmental and regulatory processes. Current matters of particular interest now are amendments to the state's "bottle law", consumer food issues, state sales tax reform, and authorization of the sale of wine in food stores.
1990 Meeting: NYSFMA 90th Annual Convention and Trade Show Atlantic City Convention Center October 14-16, 1990

Publications: THE ADVOCATE, FoodScan

NEW YORK STATE FRUIT TESTING COOPERATIVE ASSOCIATION
West North St. Dept TG, Geneva, NY 14456
Tel: 315-787-2205
Company officials:
Pres. Timothy Nourse
Publications: NEW NOTEWORTHY FRUITS (catalog)
NNFA
150 Paularino St., Costa Mesa, Ca 92626
Tel: 714-966-6632
Publications: NNFA MONITOR (directory)

NONPRESCRIPTION DRUG MANUFACTURERS ASSOCIATION
1150 Connecticut Ave NW, Washington, DC 20036
Tel: 202-429-9260; Telex: 75-9293 (NDMA US); FAX: 202-223-6835
Company officials:
Pres. James D. Cope
Represents manufacturers of nonprescription medicines

NORTH AMERICAN BLUEBERRY COUNCIL
P.O. Box 166, Marmora, NJ 08223
Tel: 609-399-1559; FAX: 609-399-1590
Company officials:
Pres. Art Galletta
1st VPres. Deane Rambo
2nd VPres. Dorothy Madison
Sec. & Mgr. Myrtle L. Ruch
Promotion of blueberries
1991 Meeting: 26th NABC Annual Meeting Taj Mahal - Atlantic City, NJ Feb 3-6. 1991
Publications: CALYX (bi-monthly newsletter)

NORTH CAROLINA FOOD DEALERS ASSOCIATION
P.O.Box 6066, Charlotte, NC 28207
Tel: 704-334-3935
Company officials:
Jr. Exec. VP. G. Everett Suddreth
Retail Grocers & Supermarkets., to promote goodwill and better understanding of the industry with the consuming public
1990 Meeting: 63rd Annual Convention & Trade Show Charlotte Convention Center, Charlotte, NC Aug. 12, 13, 14, 1990
Publications: The Carolina Food Dealer

NORTH DAKOTA DAIRY PROMOTION COMMISSION
4023-G N. State St., Bismarck, ND 58501-0620
Tel: 701-224-3134

NORTH DAKOTA GROCERS ASSOCIATION
P.O.Box 758, Bismarck, ND 58502
Tel: 701-223-4106
Company officials:
Exec. Dir. Tom Woodmansee
Publications: NORTH DAKOTA GROCERS ASSOCIATION BULLETIN

NORTHERN CALIFORNIA GROCERS ASSOCIATION
1807 Tribute Rd. Sacramento, CA 95815
Tel: 916-929-9741
Company officials:
Pres. Karen Schulke

NORTHWEST FISHERIES ASSOCIATION
2208-G N.W. Market St., Seattle, WA 98107
Tel: 206-789-6197
Company officials:

Exec. Dir. Greg Bloom
Exec. Sec. Jenice Wentz

NORTHWEST FOOD PROCESSORS ASSOCIATION
2300-G SW 1st #102, Portland, OR 97201-5047
Tel: 503-226-2848
Company officials:
Pres. Davil A. Pahl
To develop and promote the Northwest food processing industry so as to best serve association members in a manner consistent with the public interest and the principles of free enterprise.
1991 Meeting: Annual Convention and Exhibition Portland Convention Center January 13-16, 1991

NORTHWEST PACKERS INDUSTRIAL RELATIONS ASSOCIATION
7100-G S.W. Hampton, #128, Tigard, OR 97223
Tel: 503-684-1727; FAX: 503-620-9835
Company officials:
Pres. Gary G. Barnes
NPIRA is an association of food processing companies in Oregon, Washington, and California. Our services are in the areas of labor relations, personnel, and overall human resource management. We provide representation, training, and information services.
1991 Meeting: Conference on Human Resources TBA; Portland, Oregon April 10 and 11, 1991
Publications: Management Bulletin

NORWEGIAN TRADE COMMISSION
800 Third Ave 23rd Floor, New York, NY 10022
Tel: 212-421-9210

OKLAHOMA GROCERS ASSOCIATION
P.O.Box 18716, Oklahoma City, OK 73154
Tel: 405-525-9419
Company officials:
Pres. Larry Dillard
Publications: OKLAHOMA FOOD JOURNAL

OLIVE OIL ASSOCIATION OF AMERICA
177-G Main St., Box 776, Matawan, NJ 07747
Tel: 201-583-8188; Telex: 21-9262 TLX UR; FAX: 201-583-0798
Company officials:
Exec VP. R. Sullivan
To effectively promote the consumption of olive oil through publicity on its nutritional and health benefits, its unique taste characteristics, and the versatility of its uses. To adopt terminology for the different grades and types of olive oil that is in harmony with internationally recognized terminology and the particular needs of the U.S. market place; and to provide this information to the food industry and the consumer. To represent the industry before government agencies and trade associations, here and abroad, insofar as they affect the olive oil market in the U.S.
Publications: Association of Food Industries 89 - (Annual); AFI Newsletter.

ONTARIO FOOD PROCESSORS ASSOCIATION
2395-G Cawthra Rd., Mississauge, ON, CAN L5A 2W8
Tel: 416-276-6727
Company officials:
Pres. H. Penner
Exec VP. E. Chudleigh

ONTARIO FRUIT & VEGETABLE GROWERS' ASSOCIATION
301 Ontario Food Terminal 165 The Queenaway, Toronto, ON, CAN M8Y AH8
Tel: 416-255-4473
Company officials:
Exec. Sec. John P. Van der Zaim
Pres. Jim Hughes
1st VP. Jeffrey Wilson
2nd VP. Rne Peekstok
Fruit & vegetable growers. We are a lobbying association representing all fruit & vegetable growers in Ontario.
1991 Meeting: OF & VGA Annual Meeting & Convention Sheraton, Hamilton Jan. 22-24, 1991.

OUACHITA VALLEY DAIRY ASSOCIATION, INC.
519-G California Ave. S.W., Pine Bluff, AR 71603
Tel: 501-534-0021

OZARK EMPIRE GROCERS ASSOCIATION INC
1910-G E Meadowmers, Box 10223 Springfield, MO 65808
Tel: 417-831-6662
Company officials:
Exec Dir. George H. Dillard
Publications: Monthly publication - The Little Giant Food Bulletin

OZARK FOOD PROCESSORS ASSOCIATION
272-G Young Ave., Fayetteville, AR 72703
Tel: 501-575-4607
Company officials:
Pres. Dick Friday
Exec. VPres. J.R. Morris
Publications: Membership Directory; OFPA Newsletter

PACKAGING INSTITUTE INTERNATIONAL
20 Summer St., Herndon, VA 22091-5302
Tel: 203-325-9010
Company officials:
Exec. Dir. C. Newman
Pres. S. Bonacci
Publications: WHO'S WHO IN PACKAGING (directory), GLOSSARY OF PACKAGING TERMS (dictionary), DIRECTORY OF CONTRACT PACKAGERS (directory)

PACKAGING MACHINERY MANUFACTURERS INSTITUTE
1343 "L" St NW, Washington, DC 20005
Tel: 202-347-3838; Telex: 497-2519 PMMIUSA; FAX: 202-628-2471
Company officials:
Exec. Dir. Claude S. Breeden Jr
PMMI is a voluntary non-profit association of companies that make packaging machinery in the United States.
Publications: PMMI Packaging Machinery Directory
SIC 3565

PAULA MARKETING
P.O.Box 387. 3315-G N 124 St. Brookfield, WI 53005
Tel: 414-781-1090; TWX: 910-262-3079
Company officials:
VP. Mark Menzel
Sec. Dick Lisberg

PEANUT ADVISORY BOARD
1950 N° Park Place, Ste. 525, Atlanta, GA 30339
Tel: 212-536-8787

PEANUT BUTTER & NUT PROCESSORS ASSOCIATION
9009 Congressional Ct. Potomac, MD 20854
Tel: 301-365-4080; FAX: 301-365-7705
Company officials:
Man Dir & Gene Counsel. James E. Mack
Active members are processors and packers of peanut and tree nut products. Associate members are suppliers to the industry. Objective is to represent mutual business interests of the membership with other segments of the industry, with the media, with the public and with governmental authorities.

PENNSYLVANIA FOOD MERCHANTS ASSOCIATION
P.O.Box 870, CampHill, PA 17011
Tel: 717-731-0600
Company officials:
Pres. Albert P. Vicks

PET FOOD INSTITUTE
1101-G Connecticut Ave., Suite 700, Washington, DC 20036
Tel: 202-857-1120
Company officials:
Chmn. T. Armstrong
Publications: MONITOR (newsletter)

P G A SERVICES CO./DIV PA GROCERS DEV. FD INC.
1915-G Guernsey Ave., Abington, PA 19001 3701
Tel: 215-884-6006
Company officials:
Exec Sec. John McNelis
Services to retailers for the Mid Atlantic region
Publications: "The Source".

PHOENIX FROZEN FOOD
Rte. 1. Box 320. Edcouch, TX 78538
Tel: 512-262-4723

PICKLE PACKERS INTERNATIONAL INC
P.O.Box 606, St. Charles, IL 60174
Tel: 708-584-8950
Company officials:
Exec VP. W.R. Moore
Sec. Fran Kass

POINT-OF-PURCHASE ADVERTISING INSTITUTE
66 N Van Brunt St. Englewood, NJ 07631
Tel: 201-894-8899
Company officials:
Pres. John Kawula
Gen Mgr. Dorothy Grayson
Publications: POPAI NEWS (magazine)

THE POPCORN INSTITUTE
111 E Wacker Dr. Chicago, IL 60601
Tel: 312-644-6610; FAX: 312-565-4658
Company officials:
Exec. Dir. Wm E. Smith
Pres. James Stock
VPres. Nevin Meredith
Treas. Paul Cardinal
Popcorn processors organized to promote popcorn to consumers, engage in scientific and market research & development, publicity, and advertising for the purpose of increasing distribution and consumption of popcorn
Publications: Various promotional literature

PRIVATE LABEL MANUFACTURERS ASSOCIATION
369 Lexington Ave. New York, NY 10017
Tel: 212.972-3131; Telex: 14-7013 PLMAUSA; FAX: 212-983-1382
Company officials:
Pres. Brian Sharoff
Mktg VP. Lewis Sterler
Admin VP. Myra Rosen

An association of manufacturers of private label products whose goal is to promote private label industry

PROCESSED APPLES INSTITUTE
5775 Peachtree-Dunwoody Rd. Suite 500-D, Atlanta, GA 30342
Tel: 404-252-3663; Telex 333437 TKCO ATL; FAX: 404-252-0774
Company officials:
Pres. R. Kellen
Exec. Dir. L. Davenport
Processors of apple products & supplies, scientific/technical seminar program to improve business conditions to improve the industry to serve the consumers.

PRODUCE MARKETING ASSOCIATION
1500-G Casho Mill Rd., Newark, DE 19711
Tel: 302-738-7100; Telex: 499-6621 PMAJNT; FAX: 302-731-2409
Company officials:
Exec. VP. Robert L. Carey
A trade association for companies involved in all aspects of produce industry
Publications: INTERNATIONAL DIRECTORY, FLORAL MARKETING DIRECTORY & BUYERS GUIDE, MEMBERSHIP DIRECTORY

PROMOTION MARKETING ASSOCIATION OF AMERICA INC
322 Eighth Ave, Ste 1201, New York, NY 10001
Tel: 212-206-1100; FAX: 212-929-1408
Company officials:
Bd Chmn. Forest Harwood
Chmn-Elect. Allan S. Winneker
Vice Chmn. V. O. Hamilton
Sec. Robert A. Bell
Treas. Frances Caci
An association of companies providing services & or products relating directly to sales promotion industry.

RESTAURANT ASSOCIATION OF METROPOLITAN WASHINGTON
7926-G Jones Branch Dr., McLean, VA 22102-3390
Tel: 703-356-1315
The mission of the Association is to represent & promote the foodservice industry in the Washington Metropolitan area through education, government relations, & socio-professional activities
1990 Meeting: GALA TBA June 23, 1990
Publications: "Restauranteur"

RETAIL BAKERS OF AMERICA
Presidential Bldg 6525-G Belcrest Rd. Hyattaville, MD 20782
Tel: 301-277-0990; 800: 800-638-0924; FAX: 301-277-2090
Company officials:
Exec. VP. R. Gohla

RETAIL CONFECTIONERS INTERNATIONAL
1807-G E. Pierce St., Phoenix, AZ 85004
Tel: 602-252-9761; FAX: 602-252-9021
Company officials:
Pres. Paul Bennewitz
Membership Dir. Art Persails
Office Manager. Debbie Roth
Retail grocers and suppliers of the food industry. To serve as the representing entity of the Arizona retail grocery industry regarding its common interest concerning governmental, educational, business or social issues that have implications with respect to the industry.
1990 Meeting: Annual Convention and Food Trade Show Phoenix Civic Plaza May 18, 19 & 20

1991 Meeting: Annual Convention and Food trade Show Phoenix Civic Plaza May 17, 18 & 19
Publications: "Arizona Grocer" Magazine; Arizona Grocer Industry Directory; Supply Side Newsletter; Retailer Recap

RETAIL GROCERS ASSOCIATION OF FLORIDA INC
105-G Live Oak Gardens, Suite 101, Casselberry, FL 32707
Tel: 407-392-7423
Company officials:
Pres. John B. Pearman
VP. Andy Williams
Retail Food Industry in Florida, to foster a better understanding of the retail food industry within Florida, while banding the industry together on areas of common interest/concern
1990 Meeting: 53rd Annual Convention/Trade Show Orlando, Florida, October 26-29
1991 Meetign: 54th Annual Convention/Trade Show Tamps, Florida Sept. 6-9
Publications: Florida Food Dealer (bi-monthly magazine); Express Lane (monthly newsletter)

RETAIL GROCERS ASSOCIATION OF GREATER KANSAS
2809-G W 47 St., Shawnee Mission, KS 66205
Tel: 913-384-3830
Company officials:
Pres. Jim Tracy
VP. Paul Kovac
Publications: KANSAS CITY GROCER (magazine), KANSAS FOOD NEWS (magazine)

RETAIL GROCERS ASSOCIATION OF HOUSTON
1300 Shepherd Dr, Houston, TX 77007
Tel: 713-862-3001
Company officials:
Exec. Dir. Richard Johnson
Pres. John Blair
1st VPres. Jim Gerland
2nd VPres. Ron Toy
Sec. & Treas. Kenny Galatian
1990 Meeting: Annual Convention & Trade Show Adam's Mark Hotel, Houston, TX Sept. 14-16
Publications: Gulf Coast Retail Grocer; Food Focus

RHODE ISLAND FOOD DEALERS ASSOCIATION
255 Main St., Ste 310, Pawtucket, RI 02860
Tel: 401-722-9303
Company officials:
Exec. Dir. R. Sotati

RICE COUNCIL OF AMERICA
P.O.Box 740123, Houston, TX 77274
Tel: 713-270-6699; Telex: 79-4295 RICECOUNCIL HOU; FAX: 713-270-9021; 713-270-1146
Company officials:
Exec VP. B. Goldsmith
Mktg VP. R Meyers

THE RICE MILLERS ASSOCIATION
1235 Jefferson Davis, Arlington, VA 22202
Tel: 703-920-1281; Cable: RICEMILERS
Telex: 89-2751 RMA AGTN; FAX: 703-521-5874
Company officials:
Pres. David Graves
Chmn. Ron Calley

1990 Meeting: RMA Annual Mtg. Hyatt Grand Cypress, Orlando, Florida June 7,8 & 9
1991 Meeting: Westin Bayshore Vancouver, B.C. June 9, 10 & 11.

RICHARDS, ALEX, ASSOCS.
322D Englishtown Rd, Suite 102, Old Bridge, NJ 08857
Tel: 201-251-4400; FAX: 201-251-4440
Company officials:
Pres. Richard Sohn

RMCBS INC.
P.O. Box 723128, Atlanta GA 30339
Tel: 404-432-9811
Company officials:
Pres. V Clanton
VP. P. Schilling
Sec. M. Goeckel
Treas. P. DeClue
Leading food brokers of Atlanta; goals are to encourage a high degree of cooperation among brokers and customers to advance food retailing in the market.

THE ROBERT H. KELLEN CO
Suite 500-D, 5775 Peachtree-Dunwoody Rd., Atlanta, GA 30342
Tel: 404-252-3663

ROCKY MOUNTANIN BEAN DEALERS ASSOCIATION
7100-G Bwy, Bldg, #6 Penthouse N, Denver, CO 80221
Tel: 303-429-3781
Company officials:
Admin Sec. Paula Geary
Publications: MEMBERSHIP DIRECTORY

ROCKY MOUNTAIN FOOD DEALERS ASSOCIATION
800-G Grant St. Denver, CO 80203
Tel: 303-830-7001
Company officials:
Exec Dir. Gaylord Hanson
An association of retail grocers, food broker food mirs, & allied food industry businesses in CO & WY which serves its members through legislative lobbying, trouble shooting, trade representation on boards, conventions, social events, & publications
Publications: THE ROCKY MOUNTAIN FOOD DEALER (bi-monthly magazine), THE BULLETIN (bi-monthly newsletter)

ROGGEN FARMERS ELEVATOR ASSOCIATION
P.O.Box 8, Roggen, CO 80652
Tel: 303-849-5506
N° of employees: 450

ROTELLE INC.
P.O.Box 370, West Point, PA 19486
Tel: 215-643-2700
Company officials:
Pres. Joseph W. Riley Jr.
VP. John J. Welch
Jr. wnd VP. Carl Haag
Sec. William A. Sions
An association devoted to promoting the frozen food industry in the Delaware Valle.

SALAD MANUFACTURERS ASSOCIATION
2971 Flowers Rd South, Ste. 266, Atlanta, GA 30341
Tel: 404-452-0660

SALT INSTITUTE
700 N. Fairfax St. Ste, 600, Alexandria, VA 22314
Tel: 703-549-4648
Company officials:
Pres. R. L. Hanneman

SHORE LOBSTER & SHRIMP INC
536-G Fayette St. Perth Amboy, NJ 08861
Tel: 201-826-9100
Company officials:

Noel J. Blackman Pres

SHORE TRADING CO
145 Norcross St, Roswell, GA 30075
Tel: 404-998-0566

SHREVEPORT FOOD BROKERS ASSOCIATION
Beadles & Wright Inc, Box 1770, Shrevepor LA 71166
Tel: 318-221-8642
Company officials:
Pres. Larry J. Beadles

SINGLE SERVICE INSTITUTE
1025 Connecticut Ave., NW, Washington, DC 20036
Tel: 202-822-6420

SIOUX FALLS FOOD BROKERS ASSOCIATION
1603-G "C" Ave, Sioux Falls, SD 57104
Tel: 605-336-2963; Telex: 6293-5999
Company officials:
Pres. J.Westra
VP. Paul Eske
Sec & Treas. Chuck Wood
VP. Tami Triebwasser
An association to promote the food brokers business in South Dakota

SNACK FOOD ASSOCIATION
1711 King St. Alexandria, VA 22314
Tel: 703-836-4500; Telex: 704234; FAX: 703-836-8262
Company officials:
Pres. Jim. Shufelt
Off. Mgr. Charlene Nichols
Dir of Communication. Al Rickard
The Snack Food Association is an international trade association that represents snack manufacturers and suppliers to the snack industry. Products represented include extruded, sheeted, poached, baked, fried, dried, puffed, or popped vegetable, fruit, grain, nut or meal based snacks. SFA sponsors an annual trade show and convention, published the monthly Snack World magazine, and provides educational and promotional services to its members.
1991 Meeting: SNAXPO '91 San Antonio, Texas February 16-19, 1991
Publications: Snack World (montly four-color magazine)
N° of employees: 657

THE SOAP & DETERGENT ASSOCIATION
475-G Park Ave., S., New York, NY 10016
Tel: 212-725-1262; FAX: 212-213-0685
Company officials:
Pres & Sec. Theodore e. Brenner
Jr. Chmn. Stephen P. Donovan
Vice Chmn. David F. Webb
Treas. Robert F. Bartlett
National Trade organization, founded in 1926 whose members include the manufacturers of more than 90% of the soaps and detergents produced in the U.S. each year. Member companies include producers of finished household and industrial and institutional cleaning products, raw materials suppliers, and producers of oleochemicals and glycerine.

SOCIETY FOR FOODSERVICE MANAGEMENT
304 W. Liberty St. Ste 301, Louisville, KY 40202
Tel: 502-583-3783

SOUTH TEXAS RETAIL GROCERS ASSOCIATION
1427 Grey Oak, Dr. San Antonio, TX 78213
Tel: 512-583-3783
Company officials:
Pres. V. Zamzow

2nd VPres. Norman Pentecost
Chmn. of the Board: Clayton Garris
Exec. Dir. Treas.-Secy. J. Walker
Seminars Legislative programs and to promote good business practices
Publications: An occasional newsletter

SOUTHEAST UNITED DAIRY INDUSTRY ASSOCIATION INC.
1777 Phoenix Pkwy., Ste, 101, Atlanta, GA 30349-5495
Tel: 404-996-6085

SOUTHEASTERN FISHERIES ASSOCIATION
312 E Georgia St. Tallahassee, FL 32301
Tel: 904-224-0612
Company officials:
Bd Chmn. Ron Harrison
Pres. Ralph Avlesworth

SOUTHEASTERN FOOD PROCESSORS ASSOCIATION INC
1315 W Taylor St. Griffin, GA 30223
Tel: 404-227-2803
Company officials:
Pres. Jerry Bloodworth
VP. Marion Swink
Publications: FOOD FORUM (newsletter)

SOUTHEASTERN MEAT ASSOCIATION
3437-G S.W. 24 Ave., Gainesville, FL 32607
Tel: 904-372-0438; FAX: 904-378-6483
Company officials:
Exec. Dir. W.L. Brown
Pres. David Solana
VPres. Allen Cherry
Treas. David Lee
The Southeastern Meat Association is an organization with specific goals and services designed to benefit every member. It aims to foster, improve and develop a full potential of all members and to affiliate with groups whose interests are in agreement with its own, It strives to promote rules, regulations, and legislation advantageous to the meat industry, it will move to protect its membership from unethical and unfair competition and to advance the membership's welfare and help build a healthy climate for the industry's benefit
1990 Meeting: Southeastern Meat Association Annual Convention Ponte Vedra Inn & Club, Ponte Vedra Beach, Florida June 29-30, 1990
1991 Meeting: Shoutheastern Meat Association Annual Convention Callaway Gardens, Pine Mountain, GA June 14-15, 1991

SOUTHERN CALIFORNIA GROCERS ASSOCIATION
443-G Shatto Pl., Los Angles, CA 90020
Tel: 213-381-5811
Company officials:
Pres. Steve Koff
Controller. Abdul Rahid
Secy./legal Counsel. Jim Gilson
Retail and supplier manufacturers serving the Southern California food industry
Publications: Grocers Journal of CA

SOUTHERN UNITED STATES TRADE ASSOCIATION
World Trade Center, Number 2 Canal St., New Orleans, LA 70130
Tel: 504-568-5986; Telex: 287859 SUSTA
UR

SOUTHWEST MEAT ASSOCIATION
1333-G Corporate Dr., Irving, TX 75038
Tel: 214-550-1838

Company officials:
Exec. Dir. Leon Kothman
Pres. Paul Taber
1st VPres. Bob Ondrusek
2nd VPres. John Bellinger
Secy. Don Rea
Meat trade association - representing meat industry throughout Texas, Oklahoma, Ar, LA, NM. Mostly independent slaughterers and processors
Publications: Bi-monthly newsletter

ST. LOUIS FROZEN FOOD COUNCIL
P.O.Box 20068, St. Louis, MO 63144
Tel: 314-644-5001

THE SUGAR ASSOCIATION INC
1101 15th St NW, #600, Washington, DC 20005
Tel: 202-785-1122; TWX: 710-822-1131;
Fax: 202-785-5019
Company officials:
Pres. Charles D. Shamel
An association of processors & refiners of beet & cane sugar which administer funds for promoting sucrose research & public relations activities.
Publications: SUGAR & HEALTH (newsletter)

SWEDISH TRADE OFFICE
599 Lexington Ave 42nd Fl., New York, NY 10022
Tel: 212-838-5530

SWITZERLAND CHEESE ASSOCIATION
704 Executive Boulevard, Valley Cottage, NY 10989
Tel: 914-268-2460; FAX: 914-268-2480
Company officials:
Pre. Helga Gruenstrass
VP. H. Gruenstrass

TEA ASSOCIATION OF THE UNITED STATES OF AMERICA INC
230 Park Ave. New York, NY 10169
Tel: 212-986-9415; Cable: TEAFRONT; Telex: 497-4003 TEA UI
Company officials:
Exec. Sec. Theresa K. Kulks

TENNESSEE WHOLESALE GROCERS' ASSOCIATION
2932 Foster Creighton Dr, Nashville, TN 37204
Tel: 615-254-3520
Company officials:
Exec. Dir. Jimmie E. Dunn
Wholesale grocer/distributor/-institutional wholesalers/food brokers/suppliers.
Manufacturers/processors of foods - non-foods - tobacco distribution.
Goal: Promote the goodwill of all segments of the food industry in TN.
1990 Meeting: 42nd Annual Convention Gatlinburg, TN Oct. 23-24-25, 1990
Publications: Monthly membership newsletter.

TEXAS RETAIL GROCERS ASSOCIATION
7333 Hwy 290 E. Austin, TX 78723
TEl: 512-926-9285
Company officials:
Pres. Glen Holt
VP. Terry Pickard
Publications: TEXAS FOOD MERCHANT
MAGAZINE, TRGA ANNUAL DIRECTORY

TEXAS SHRIMP ASSOCIATION
403 Vaughn Building, Austin, TX 78701
Tel: 512-476-8446; FAX: 512-477-3234
Company officials:
Exec. Dir. Ralph Rayburn

Exec. Asst. L. Gibbs
Gulf shrimp vessel owners & support industries.
Publications: Shrimp Tales (6 per year)

THE TOBACCO INSTITUTE
1875 "I" St NW. Washington, DC 20006
Tel: 202-457-4800
Company officials:
Pres. Samuel D. Chilcote Jr

TOBACCO MERCHANTS ASSOCIATION OF THE US INC
P.O.Box 8019. Princeton, NJ 08543-8019
Tel: 609-275-4900
Company officials:
Pres. Farrell Delman
TMA members are leaf growers and distributors, cigarette and related-product manufacturers, finished product distributors, financial community, and marketing firms. TMA is a nonprofit information gathering center for the tobacco industry. Our goal is to provide information for the entire tobacco industry from seed to ash, legislative/regulations, economic and media.
Publications: Executive Summary; Legislative Bulletin; Leaf Bulletin; Tobacco Barometer Trademark Report; International Executive Summary; Issues Monitor

TOY MANUFACTURERS OF AMERICA
200 Fifth Ave. New York, NT 10010
Tel: 212-675-1141; FAX: 212-633-1429
Company officials:
Pres. Douglas Thomson
Toy Mfrs of America, Inc is the trade assn for domestic producers and importers of toys, games and holiday decorations. Goals are to promote the interests of toy mfrs & to help assure that consumers can purchase toys that are safe & sturdy
Publications: American International Toy Fair Annual Directory

TRADEDELINK, INC
2600-G Douglas Rd., Coral Gables, FL 33134
Tel: 305-443-1869

TRI-STATE DAIRY-DELI ASSOCIATION
P.O.Box 0037, Huntington Valley, PA 19006-0037
Tel: 215-934-6000

TUNA RESEARCH FOUNDATION INC
1101 17 St NW, Washington, DC 20036
Tel: 202-857-0610
Company officials:
Chmn Edward Ryan
Vice Chmn. Michael Dunn

UNITED DAIRY INDUSTRY ASSOCIATION
6300 N River Rd, Rosemont, IL 60018
Tel: 708-696-1860; FAX: 708-696-1033
Company officials:
Chmn. Herman M. Brubaker
1st Vice Chmn. Elwood C. Kirkpatrick
Sec. Raymond E. Johnson
Treas. William Thornton
United Dairy Industruy Association is a federation of state and regional, dairy farmer funded promotion organizations. Our purpose is the generic promotion of real, domestically produced milk and milk products. UDIA funds and administers the programs of its three operating subsidiaries American Dairy Association, National Dairy Council, and Dairy Research, Inc.

1990 Meeting: Annual Meeting - House of Delegates Marriott, Salt Lake City, Utah September 20-21
Publications: Annual report

UNITED DAIRY INDUSTRY OF MICHIGAN
2163 Jolly Rd., Okemos, MI 48864
Tel: 517-349-8923

UNITED DAIRYMEN OF ARIZONA
2008-G S. Hardy Dr., Tempe, AZ 85282-7211
Tel: 602-968-7814

UNITED DAIRYMEN OF IDAHO
1365-G N Orchard, Boise, ID 83706-2289
Tel: 208-327-7050

UNITED FOOD AND COMMERCIAL WORKERS INTERNATIONAL UNION
1775 K St., NW/Suffridge Bldg., Washington, DC 20006
Tel: 202-223-3111

UNITED FRESH FRUIT & VEGETABLE ASSOCIATION
727 N Washington St. Alexandria, VA 22314
Tel: 703-836-3410; TWX: 510-101-2401; FAX: 703-836-7745
Company officials:
Pres. George S. Duniop
National/International Trade Ass'n representing all aspects of the fresh fruit & vegetable industry.
1991 Meeting: Convention and Exposition Anaheim, Calif, February 4-6. 1991
Publications:
NEWSWIRE (weekly newsletter), OUTLOOK (quaterly, includes annual membership directory)

UNITED STATES BEET SUGAR ASSOCIATION
1156 15St. Washington, DC 20005
Tel: 202-296-4820
Company officials:
Pres. David C. Carter
Publications: UNITED STATES BEET SUGAR DIRECTORY

UNITED STATES CANE SUGAR REFINERS' ASSOCIATION
1001 Connecticut Ave, Washington, DC 20036
Tel: 202-331-1458
Company officials:
Pre. Nicholas Kominus
VP. Helen P. Lowenstein
Refiners of cane sugar

UTAH DAIRY COMMISSION
1213-G E. 2100 South, Salt Lake City, UT 84106-2824
Tel: 801-487-9976

UTAH RETAIL GROCERS ASSOCIATION
1578-G W 1700 S. Salt Lake City, UT 84104
Tel: 801-973-9517
Company officials:
Pres. James V Olsen
Publications: The Intermountain Retailer (magazine)

VERMONT GROCERS ASSOCIATION
33-G Lafayette St., Rutland, VT 05701
Tel: 802-775-5460
Company officials:
Pres. James Harrison
Chmn. David Sweeney
1st VPres. Dean Comstock
Sec. treas. Victoria Kingabury
Membership consists of retail food stores and their suppliers doing business in Vermont
1990 Meeting: Annual Convention and Trade Show Sheraton Hotel, So. Burlington, VT Sept 7-9, 1990
Publications: Newsletter "The Grocery Slip", Annual directory

THE VINEGAR INSTITUTE
5775 Peachtree-Dunwoody Rd. Suite 500-D, Atlanta, GA 30342
Tel: 404-252-3663; Telex: 333437 TKCO
ATL: FAX: 404-252-0774
Company officials:
Pres. R. Kellen
Exec. Dir. L. Davenport
Manufacturers and bottlers of vinegar and suppliers to the industry. Coordinates scientific projects for the vinegar industry; acts as liaison between government and the vinegar industry; conducts consumer education program.

VIRGINIA-CAROLINA PEANUT ASSOCIATION INC
PO Drawer 499, Suffolk, VA 23434
Tel: 804-539-2100; FAX: 804-539-3067
Company officials:
Pres. John G. Demoss
Independent retail grocers and convenience store operators association.
1990 Meeting: 1990 Annual Convention & Buyers Exhibit Richmond Centre & Marriott Hotel, Richmond, VA September 30-December 3, 1990
1991 Meeting: 1991 Annual Convention & Buyers Exhibit Richmond Centre & Marriott Hotel October 18-21, 1991
Publications: Foodsman, Update

VIRGINIA FOOD PROCESSORS ASSOCIATION
1307-G Palmer Dr., Blacksburg, VA 24060
Tel: 703-552-1453
Company officials:
Exec. Secy. Treas: Jane C. Cooler

VIRGINIA WHOLESALERS & DISTRIBUTORS ASSOCIATION
P.O. 2129, Richmond, VA 23216
Tel: 804-643-4715
Company officials:
Pres. Josephine Brown
VP. Robin Ray
Publications: WHOLESALERS & DISTRIBUTORS ANNUAL DIRECTORY

WASHINGTON OREGON SHIPPERS CO-OP ASSOC INC
801-G 1st Ave S. PO Box 24007, Seattle, WA 98134
Tel: 206-292-2100
Company officials:
Pres. Brian Volkert
Publications: EXPRESS (newsletter)

WASHINGTON STATE FOOD DEALERS ASSOCIATION
48-G E. 19st Tacoma, WA 98421
Tel: 206-272-2966; 800: 800-732-1889 (in WA only)
Company officials:
Acting Pres. Geoff Gibbs
An association of grocers in Washington & Alaska plus associate members selling products/services to retailers
Publications: WASHINGTON FOOD DEALER MAGAZINE, GROCERY SCAN (newsletter), ANNUAL GROCERY INDUSTRY DIRECTORY

WASHINGTON STATE POTATO COMMISSION
108-G Interlake Rd., Moses Lake, WA 98837
Tel: 509-765-8845

WEST COAST FISHERIES
812-G SW Washington, Porthland, OR 97205
Tel: 503-222-3518
Company officials:
Dir. Opers. Donna Reed

WESTERN DAIRY-DELI ASSOCIATION
24-G Cazneau Ave., Sausalito, CA 94965
Tel: 415-331-2616

WESTERN GROWERS ASSOCIATION
P.O. Box 2130, Newport Beach, CA 92658
Tel: 714-863-1000
Company officials:
Sr VP. M. Stuart
Pres. D. Moore

WESTERN STATE MEAT ASSOCIATION
P.O. Box 12944, Oakland, CA 94604
Tel: 415-763-1533; FAX: 415-763-6186
Company officials:
Chrmn/Brd. A. Flocchini
Pres. G. Waldman
Publications: Weekly Newsletter "Lean Trimmings" **WESTINGHOUSE**
6 Gateway Ctr, Rm 1064, Pittsburgh, PA 15222
Tel: 412-642-3247

WINE INSTITUTE
165-G Post St. San Francisco, CA 94108
Tel: 415-986-0878; Cable: Wine: TWX: 510-100-4310
Company officials:
Pres. John De Luca

WISCONSIN CHEESE AND SAUSAGE PROMOTIONS
Box 8911 801 W. Badger Rd., Madison, WI 53708
Tel: 608-266-7181

WISCONSIN CHEESE MAKERS' ASSOCIATION
P. O. Box 2133, Madison, WI 53701
Tel: 608-255-2027
Company officials:
Pres. Dave Simon
VP. Fred Laack
Publications: FACTORY TO YOU (buyers guide), ASSOCIATION NOTES (newsletter)

WISCONSIN DAIRY PRODUCTS
802 W. Broadway, Madison, WI 53713
Tel: 608-221-1035

WISCONSIN GROCERS ASSOCIATION
802-G W, Broadway, Madison WI 53713
Tel: 608-222-4515; FAX: 608-222-3111 *Company officials:*
Pres & CEO. John Ellington
Statewide trade & service association for all segments of the Wisconsin grocery industry., food supermarkets, convenience stores, wholesale distributors and industry related companies
1990 Meeting: MECCA CONVENTION CENTER
Hyatt Regency Hotel, Milwaukee, WI
Sept 30 - Oct 2, 1990
Publications: Wisconsin Grocer magazine-published six times yearly, Goverment Report-Presidents Newsletter

WISCONSIN MILK MARKETING BOARD
8418-G Excelsior Dr., Madison, WI 53717
Tel: 608-836-8820

YOUNGSTOWN AREA GROCERS ASSOCIATION
4140-G Market St. Youngstown, OH 44512
Tel: 216-782-4426
Company officials:
Pres. R. Graff
VP. W Stanton
Exec. Dir. C. Burkey
Treas. D. Sturgeon

Grocery industry-education & information
Publications: Weekly Newsletter

YUASA TRADING CO INC
150 E 52nd St. 31st Fl, New York, NY 10022
Tel: 212-751-3800; FAX: 212-751-3831

SOME EXAMPLES OF MAJOR TRADE SHOWS IN NORTH AMERICA

The following lists of food industry trade shows are taken from the Thomas Food Industry Register (1990/91) for the U.S.A. and from the monthly trade magazine Food in Canada, Maclean-Hunter Publishing Co., for Canada, and reproduced unedited in this publication.

(a) U.S.A. - Emphasis

1990
June 2-5
Food Retailers Association of South Carolina
(803) 256-7351
Myrtle Beach Convention Center, Myrtle Beach, SC

June 3-5
International Dairy-Deli Association
(608) 238-7908
Baltimore Convention Center, Baltimore, MD

June 9-12
Texas Retail Grocers Association
(512) 926-9285
San Antonio Convention Center, San Antonio, TX

June 17-20
Institute of Food Technologists Annual Meeting & Food Expo
(312) 782-8424
Anaheim Convention Center, Anaheim, CA

June 24-26
Texas Restaurant Association Regional Food Service Convention & Exposition
(512) 444-6543
Dallas Convention Center, Dallas, TX

July 7-8
International Restaurant & Hotel Suppliers Exposition
(305) 255-6095
Coconut Grove Exhibition Center, Miami, FL

July 8-11
International Fancy Food & Confection Show (Summer)
(203) 964-0000
Jacob K. Javits Convention Center, New York, NY

July 18-21
National Coffee Services Association Annual Convention
(703) 255-0455
Fairmont Hotel, New Orleans, LA

July 25-29
National Candy Wholesalers Assn. National Summer Convention & Exposition
(202) 463-2124
World Congress Center, Atlanta, GA

July 28-31
American Convention of Meat Processors
(717) 367-1168
Ryman Exhibit Hall, Opryland Hotel, Nashville, TN

Aug. 12-14
North Carolina Food Dealers Assn.
(704) 334-3935
Charlotte Convention Center, Charlotte, NC

Sept, 8-10
Florida Restaurant Association International Foodservice Expo
(305) 925-6381
Orange County Convention/Civic Center, Orlando, FL

Sept. 14-16
Retail Grocers' Association of Houston Annual Convention & Trade Show
(713) 862-3001
Adams Mark Hotel, Houston, TX

Sept. 15-17
California Grocers Association Trade Show & Convention
(916) 448-3545
Anaheim Convention Center, Anaheim, CA

Sept. 23-26
National Beer Wholesalers' Assn. Annual Convention & Exhibit
(703) 578-4300
Georgia World Congress Center, Atlanta, GA

Sept. 24-26
National Association of Convenience Stores
(703) 684-3600
Dallas Convention Center, Dallas, TX

Sept. 30-Oct. 1
Great Lakes Expo-Wisconsin Grocers' Association
(608) 222-4515
Milwaukee Exposition & Convention Center, Milwaukee, WI

Sept. 30-Oct. 1
Virginia Regional Hospitality Expo
(804) 2898-8729
Richmond Centre, Richmond, VA

Oct. 7-8
Fall Michigan & Great Lakes Food Service Show
(617) 536-8152
Cobo Conference & Exhibit Center, Detroit, MI

Oct. 8-12
Canadian Dairy & Food Industries Supply Association Exposition 1990
(301) 984-1444
Montreal Convention Centre. Montreal, PQ

Oct. 12-14
Atlanta International Wine Festival

(404) 873-4482
Georgia World Congress Center,
Atlanta, GA

Oct. 13-15
Midwestern Foodservice & Equipment Exposition
(816) 753-5222
Alfonso J. Cervantes Convention Center, St. Louis. MO

Oct. 14-15
Ohio Grocers Trade Show
(614) 452-4541
Ohio Center, Columbus, OH

Oct. 14-17
National Frozen Food Convention & Exposition
(301) 468-3210
San Francisco Hilton, San Francisco, CA

Oct. 14-18
American Association of Cereal Chemists Annual Meeting
(612) 454-7250
Loew's Anatole, Dallas, TX

Oct. 18-21
American Meat Institute Convention and Exposition
(701) 841-2400
San Diego Marriott, San Diego, CA

Oct. 22-24
CentrEx
(204) 942-0671
Winnipeg Convention Center
Winnipeg, MB

Oct. 23-25
Arkansas Trade Show & Convention
(501) 376-2323
Statehouse Convention Center,
Little Rock, Ar

Oct. 23-27
International Bottled Water Assn. Annual Convention & Tradeshow
(703) 683-5213
Washington Hilton & Towers,
Washington, DC

Oct. 26-Nov. 4
Agriculture, Wine & Food Show International
(514) 745-0280
Olympic Stadium & Velodrome,
Montreal, PQ

Oct. 27-29
Midway USA Regional Foodservice Exposition
(316) 267-8383
Century II, Wichita, KS

Oct. 27-30
Produce Marketing Association Convention & Exposition
(302) 738-7100
New Orleans Convention Center,
New Orleans, LA

Oct. 29-31
InterBev
McCormick Place Complex,
Chicago, IL

Nov. 2-4
Natural Foods Expo East
(303) 939-8440
Philadelphia Civic Center,
Philadelphia, PA

Nov. 3-6
Southeastern Hospitality & Foodservice Show
(404) 873-4482
Georgia World Congress Center,

Atlanta, GA

Nov. 4-6
Grocery Showcase Canada
(416) 449-3020
Metro Toronto Convention Centre,
Toronto, ON

Nov. 11-14
International Hotel/Motel &
Restaurant Show
(212) 686-6070
Jacob K. Javits Convention Center
New York, NY

Dec. 1-2
Virginia Food Dealers Association
Annual Buyers Exhibit
(804) 644-0731
Richmond Center; Richmond, VA

Dec. 7-10
National Food Brokers
Association Sales and Marketing
Convention & Marketing Expo
(202) 789-2844
Hyatt Regency Chicago Convention
& Exposition Center/Wacker Hall,
Chicago, IL

1991

Jan. 28-31
National Grocers Association
Annual Convention and Exhibition
(703) 437-5300
New Orleans Convention Center,
New Orleans, LA

Jan. 29-31
Great Lakes Vegetable Growers
Convention
(517) 485-2309
Grand Center, Grand Rapids, MI

Jan. 29-31
International Poultry Educational
Trade Show
(404) 377-6465
Georgia World Congress Center,
Atlanta, GA

Feb. 10-12
International Fancy Food &
Confection Show (Winter)
(203) 964-0000
San Diego Convention Center,
San Diego, CA

Feb. 11-13
International Caterers Show &
Conference
(312) 922-0966
Sheraton, Washington, DC

Feb. 12-14
Sea Fare '91
(206) 547-6030
Long Beach Convention Center,
Long Beach, CA

Feb. 16-19
Snaxpo '91
(703) 836-4500
San Antonio Convention Center,
San Antonio, CA

Feb. 19-21
Upper Midwest Hospitality
Restaurant & Lodging Show
(612) 222-7401
St. Paul Civic Center, St. Paul, MN

Mar. 3-6
National American Wholesale
Grocers Annual Convention
(703) 532-9400

Los Angeles, CA

Mar. 9-10
Ark-La-Tex Food & Equipment Exposition
(504) 831-7788
Shreveport Exposition Hall,
Shreveport, LA

Mar. 10-13
International Exposition for Food Processors
(703) 684-1080
McCormick Place, Chicago, IL

Mar. 12-14
The Boston Seafood Show
(207) 772-3005
Hynes Convention Center, Boston

Mar. 20-22
Catering Expo
(812) 937-4464
Rivergate Center, New Orleans, LA

Mar. 26-28
Expo '91, New York State Restaurant Association
(212) 714-1330
Farmingdale Community College,
Farmingdale, NY

Apr. 23-25
Midsouthwest Foodservice Convention
(405) 942-8181
Myriad Convention Center,
Oklahoma City, OK

May 5-8
Supermarket Industry Convention Educational Exposition
(202) 452-8444
McCormick Place, Chicago, IL

May 18-22
National Restaurant Association Restaurant, Hotel-Motel Show
(312) 853-2525
McCormick Place, Chicago, IL

CANADIAN & BEVERAGE PROCESSING ASSOCIATIONS

ALBERTA FOOD PROCESSORS ASSOCIATION: #102 15023-123rd Ave. Edmonton. AB T5V 117 Tel: (403) 453-3587, FAX: (403) 455-9910

ALBERTA BREWERS AGENT LIMITED: P.O.Box 6700, Station D, Calgary, AB T2P 2V8, Tel: (403) 265-2490 Couner Mailing: Ste. 1004. 825. 8th Ave., S.W. Calgary, Alberta T2P 2T3

ASSOCIATION OF CANADIAN BISCUIT MANUFACTURERS
1185 Eginton Ave. E., Ste, 101, Don Mills, ON M3C 3C6, Tel: (416) 429-1074 Fax: (416) 429-1940

ASSOCIATION QUEBECOIS DE L'INDUSTRIE DE LA PECHE
56 St. Pierre, Ste. 300, Quebec City, PQ G1K 4A1 Tel: (418) 692-1148, FAX: (418) 692-1854

ASSOCIATION OF CANADIAN DISTILERS STE. 1100. 90 Soarks St., Ottawa K1P 5T8, Tel: (613) 238-8444. Fax: (613) 238-3411

ATLANTIC FROZEN FOOD COUNCIL
P.O.Box 608, Dartmounth, NS B2Y 3Y9 Tel: (902) 463-2501 Fax: (902) 463-1419

ATLANTIC PROVINCES BAKERS ASSOCIATION c/o Glen Gibborns, Eastern Bakenes Ltd., P.O.Box 308, St. John. NB. Tel: (506) 633-2500. Fax: (506) 633-9837

BAKERS' ASSOCIATION OF BRITISH COLUMBIA
2892 W 24th Ave., Vancouver, BC V6L 1R4. Tel: (604) 733-1043

CANADIAN PORK COUNCIL
75 Albert St., Ste 1101, Ottawa, ON. K1P 5E7 Tel: (613) 236-9239, Fax: (613) 236-5749. Contact: Martin Rice

CANADIAN POTATO CHIP/SNACK FOOD ASSOCIATION
1101 Prince of Wales Dr., Ste. 310. Ottawa K2C 3W7, Tel: (613) 226-4187 Fax: (613) 226-2984

CANADIAN POULTRY AND EGG PROCESSORS COUNCIL: One Eva Road Ste. 300, Etobicoke, ON. M9C 425. Tel: (416) 622-8621. Fax: (416) 626-6972. Contact: Donald McKenzie, ecec. vice-president

CANADIAN SOFT DRINK ASSOCIATION
500 University Ave., Ste. 812, Toronto, ON, M5G 1V7 Tel: (416) 979-3529, Fax: (416) 979-7597. Contact: Paulette Vinette, president

CANADIAN SPECIALTY FOOD ASSOCIATION
1 Eva Rd. Ste. 409, Etobicoke, ON M9C 4Z5. Tel: (416) 626-6239, Fax: (416) 620-5392.

BAKERY COUNCIL OF CANADA
1185 Eglinton Ave. E., Ste. 101, Don Mills, ON M3C 3C6 Tel: (416) 423-0262, Fax: (416) 429-1940 Contact: Linda Nagel, president

BAKERY PRODUCTION CLUB OF ONTARIO, INC.
Mel Boles, executive administrator, 32 Bavbrook Cres., Scarporough, ON M1H 2R6. Tel: (416) 453-4139

BREAKFAST CEREAL MANUFACTURERS OF CANADA
1185 Eglinton Ave., E., Ste. 101 Don Mills, ON, M3C 3C6. Tel: (416) 429-1074

BREWERS ASSOCIATION OF CANADA
155 Queen St., Ste. 1200. Ottawa, ON K1P 6L1. Tel: (613) 232-9601. Fax: (613) 232-2283. Contact: R.A. Morrison, president

BREWERS ASSOCIATION OF NEWFOUNDLAND
35 Rowan St., Churchill Park, St John's, NF A1B 2X2 Tel: (709) 753-6430

BRITISH COLUMBIA EGG PROCESSORS COUNCIL
c/o Vanderpols Egg. 3911 Mt., Lehman Rd., Abbotstord, BC. Tel: (604) 530-6271.

BRITISH COLUMBIA FOOD PROCESSORS ASSOCIATION
1330-1100 Melville St., Vancouver, BC V6E 4A6. Tel: (604) 685-9623 M3B 2W7 Tel: (416) 449-3444 Fax: (416) 449-5685

FISHERIES ASSOCIATION OF NEWFOUNDLAND & LABRADOR LTD P.O. Box 8900, 90 O'Leary Ave., St. John's NF A1B 3R9. Tel: (709) 726-7223. Fax: (709) 739-0195. (effective April
1990. Fax: (709) 754 3339.)

FISHERIES COUNCIL OF BRITISH COLUMBIA
706-1155 Robson St., Vancouver, BC V6E 1B5. Tel: (604) 684-6454. Fax: (604) 684-5109

FISHERIES COUNCIL OF CANADA
77 Metcalte St., Ste. 505, Ottawa, ON K1P 5L6. Tel: (613) 238-7751. Fax: (613) 238-3542 Contact: R.W. Bulmer, president.

THE FOOD INSTITUTE OF CANADA 130 Albert St. Ste. 1409, Ottawa K1P 5G4 Tel: (613) 233-4029 Fax: (613) 594-8278. Contact: Christopher Kyte.

CANADIAN ASSOCIATION OF FISH EXPORTERS Ste. 200.77 Metcalte St., Ottawa K1P 5L6.
Tel: (613) 232-6325.
Fax: (613) 238-3542

CANADIAN ASSOCIATION OF REGULATED IMPORTERS 202-1673 Cyrville Rd., Gioucester, ON K1B 3L7.
Tel. (613) 745-0459 Fax: (613) 745-4097 Contact. Cyril Levenstein, chairman

CANADIAN FEDERATION OF AGRICULTURE 75 Albert St., Ste. 1101, Ottawa On. K1P 5E7 Tel: (613) 236-3633. Fax: (613) 236-5749. Contact: Patty Townsend

CANADIAN FEED INDUSTRY ASSOCITION/ ASSOCIATION CANADIENNE DES INDUSTRIES DE L'ALIMENTATION ANIMALE
325 Dalhousie St., Ste. 625. Ottawa, ON K1N 7G2 Tel: (613) 238-6421. Fax: (613) 238-6620. Contact: R.E. Martin, Exec. Dir.

CANADIAN FLEXIBLE PACKAGING INSTITUTE One Yonge St., Ste 1400, Toronto, ON, M5E 119.
Tel: (416) 363-7261.
Fax: (416) 363-3779.
Contact: John Martin, Mgr

CANADIAN FOOD PROCESSORS ASSOCIATION 130 Albert St., Ste. 1409. Ottawa K1P 5G4 Tel: (613) 233-4049, Fax: (613) 594-8278.

CANADIAN SUGAR INSTITUTE 7 King St. E., Ste. 1904. Toronto, ON M5C 1A2. Tel: (416) 368-8091 Fax: (416) 368-6426.

THE CHILLED AND FROZEN FOOD ASSOCIATION OF CANADA
1306 Wellington St., Ottawa, ON K1Y 3B2. Tel: (613) 728-6303 Fax: (613) 72B-4394 Contact:

MANITOBA POULTRY & EGG PROCESSORS ASSOCIATION INC
c/o Winnberg Chamber of Commerce, Ste. 500. 167 Lomoard Ave., Winnipeg, MB. R3B 3E5
Tel: (204) 944-8484

NATIONAL DAIRY COUNCIL OF CANADA 141 Launer Ave. W. Ste. 704, Ottawa, ON, K1P 5J3. Tel: (613) 238-4116 Fax: (613) 238-6247

NEW BRUNSWICK FISH PACKERS' ASSOCIATION Ste. 312, 236 St. George St., Moncton, NB E1C 1W1. Tel: (506) 857-3056. Fax: (506) 857-3059 Contact: Peter Dysart, Exec. Dir.

ONTARIO FISH PROCESSORS
c/o Omstead Foods, P.O. Box 520., 1 Ene St. S., Wheatley, ON N0P 2P0 Tel: (519) 825-4611. Fax: (519) 825-7144

ONTARIO FOOD PROCESSORS ASSOCIATION Unit 1, 2395 Cawthra Rd., Mississauga, ON. L5A 2W8. Tel: (416) 276-6727, Fax: (416) 276-3331 Contact: Christopher Kyte Exec. Director

CANADIAN GROCERY BAG MANUFACTURERS ASSOCIATION
One Yonge St., Ste 1400 Toronto, ON

CANADIAN HEALTH FOOD ASSOCIATION Ste. 102A 1093 W Boradway, Vancouver, BC V6H 1E2 Tel: (604) 731-4664 Fax: (604) 734-6909

CANADIAN INDUSTRIAL SWEETENER USERS 1185 Eglinton Ave E., Ste 101. Don Mills On M3C 3C6
Tel: (416) 429-1104
Contact: Linda Reid, manager

CANADIAN INSTITUTE OF FOOD SCIENCE & TECHNOLOGY
1335 Cariing Ave., Ste. 309, Ottawa, ON K1Z 8N8 Tel (613) 724-7752 Fax: (613) 724-7754

CANADIAN MEAT COUNCIL/ CONSEIL DES VIANDES DU CANADA
5233 Dundas St. West, Islington ON, M9B 1A6 Tel: (416) 239-8411 Fax: (416) 239-2416 Contact. L. M. Campbell

CMC EASTERN FIELD OFFICE 689 Rue Couves, Greenfield Park Que, 14V 117 Tel: (514) 672-3760 Contact: Roland Soucy, Director of Field Services

CMC WESTERN FIELD OFFICE
1531 Esso Tower, Scotia Place 10060 lasper Ave., Edmonton AB T5J 3RB. Tel: (403) 425-1134 Fax: (403) 426-1509

CANADIAN NATIONAL MILLERS ASSOCIATION 151 Siater St., Ste 205, Ottawa, ON K1P 5H3 Tel: (519) 653-6267

CANADIAN PASTA MANUFACTURERS' ASSOCIATION 1185 Eglinton Ave E., Ste. 101, Don Mills, ON M3C 3C8 Tel: (416) 429-4444 Fax: (416) 429-1940 Contact Linda Reid, manager

PRINCE EDWARD ISLAND SEAFFOD PROCESSORS ASSOCIATION West Royalty industrial Park. Charlottetown, PE C1E 1B0, Tel: (902) 368-5800. Fax: (902) 368-7087

QUEBEC BREWERS ASSOCIATION
Rm 475 1981 McGill College, Tour BNP Montreal, Que H3A 2W9, Tel: (514) 284-9199

QUEBEC FOOD PROCESSORS ASSOCIATION 339 Jacques-Cartier Sud. Ste. 101, Saint-jean-sur.Richelieu (Quebec) 128 4K1 Tel: (514) 346-1801 Fax: (514) 346-7552 Contact. A. Latour, Directeur Général

SASKATCHEWAN BREWERS ASSOCIATION LIMITED. P.O. Box 3057, 380 Dewdney Ave. E.m Regina, SK S4P 3G7 Tel: (306) 525-0377

CANADIAN WINE INSTITUTE 89 The Queensway W. Ste. 215, Mississauga, ON L5B 2V2 Tel: (416) 273-5610 Fax: (416) 273-6492. Contact. J. Corpett, president

COFFEE COUNCIL OF CANADA Ste. 101, 1185 Eglinton Ave E., Don Mills, ON, M3C 3C6. Tel: (416) 429-1073

CONFECTIONERY MANUFACTURERS ASSOCIATION OF CANADA 1185 Eglinton Ave. E., Ste. 101, Don Mills, ON M2C 3C6 Tel: (416) 429-1046 Fax: (416) 429-1940 Contact: Carol Hochu, president.

COUNSEIL DE LA BOULANGERIE DU QUEBEC 2950 rue Masson, Ste. 402, Montreal H1Y 1X4 tel: (514) 729-8311

EDIBLE NUT PROCESSORS OF CANADA Ste. 101, 1185 Eglinton Ave. E. Don Mills, ON M3C 3C6 Tel: (416) 429-1004

ENVIRONMENT & PLASTICS INSTITUTE OF CANADA (EPIC) 1262 Don Mills Rd. Ste. 104, Don Mills, ON

FOOD PRODUCTS ACCIDENT PREVENTION ASSOCIATION 2 Bloor St., W. 31st Fl., Toronto M4W 3N8 Tel: (416) 965-8888

FURTHER POULTRY PROCESSORS ASSOCIATION OF CANADA 1673 Cyrville Rd., Ste. 202. Gloucester ON K1B 3L7 tel: (613) 746-7928 Fax: (613) 745-4097 Contact: Robert de Valk, Gen. Mgr.

GROCERY PRODUCTS MANUFACTURERS OF CANADA 1185 Eglinton Ave. E., Ste. 101, Don Mills, ON M3C 3C6 Tel: (416) 429-4444 Contact. G. Fleischman, president

THE INSTITUTE OF EDIBLE OIL FOODS 1185 Eglinton Ave. East. Ste. 101, Don Mills, ON M3C 3C6 Tel: (416) 429-1004 Fax: (416) 429-1940 Contact: Linda Reid, Mgr

LAKE ERIE FISH PACKERS AND PROCESSORS ASSOCIATIONS P.O. Box 1236, Blenherm, ON, N0P 1A0 Tel: (519) 676-8752

MANITOBA FROZEN FOOD COUNCIL 2003 Portage Ave., Winnipeg, MB R3J 0K3 Tel: (204) 489-4566

ONTARIO FOOD PROCESSORS ASSOCIATION Unit 1, 2395 Cawthra Rd., Mississauga, ON L5A

2W8 Tel: (416) 276-6727, Fax: (416) 276-3331

ONTARIO OILSEED INDUSTRY ASSOCIATION 1185 Eglinton Ave, E. Ste. 101, Don Mills, ON, M3C 3C6 Tel: 429-4444 Fax: (416) 429-1940

ONTARIO SOFT DRINK ASSOCIATION 2 Sheppard Ave. E., Ste. 1700, Willowdale, ON M2N 5Y7 Tel: (416) 224-2555 Fax: (416) 244-1553

PACIFIC BREWERS DISTRIBUTORS LIMITED
3260 Production Way,Burnaby, BC V5A 4A8
Tel: (604) 421-1031

PET FOOD ASSOCIATION OF CANADA 1435 Goldthorpe Rd., Mississauga, ON L5G 3R2, Tel: (416) 891-2921, Fax: (416) 274-4926

PLASTIC FILM MANUFACTURERS ASSOCIATION OF CANADA
Plastic Bottle Division,Industrial Shipping Container Division, Food Service Division, 1262 Don Mills Rd. Ste. 104 Don Mills, ON M3B 2W7 Tel: (416) 449-3444 Fax: (416) 449-5685 Contact. Charmain Entine, director, Plastics in Packaging.

SASKATCHEWAN EGG PROCESSORS MARKETING BOARD Box 1637, Regina, SK S4P 3C4 tel: (306) 949-1353

TEA AND COFFEE COUNCIL OF CANADA 1185 Eglinton Ave. E., Ste. 101, Don Mills, ON, M3C 3C6 Tel: (416) 429-1073

CANADIAN HONEY PACKERS ASSOCIATION P.O. Box 1566, Nipawin, SK S0E 1E0 Tel: (306) 862-3844 Fax: (306) 862-5122

WINE COUNCIL OF ONTARIO 89 The Queensway W. Ste. 215. Mississauga, ON L5B 2V2, Tel: (416) 273-6404 Fax: (416) 273-6492. Contact: J. Corbett, Exec. Dir.

WOMEN IN FOOD INDUSTRY MANAGEMENT. 24 Blackdown Cres., Etobicoke, ON M9B 5X6 Tel: (416) 233-0007

CANADIAN SUPPLIER AND SUPPORT ASOCIATIONS

ALLIED TRADES OF THE BAKING INDUSTRY INC. c/o DCA Canada Inc., 52 Prince Andrew Place, Don Mills, On M3C 2H4 Tel: (416) 445-5320 Fax: (416) 445-7111

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Tel: (416) 939-2545

CANADIAN CORRUGATED CASE ASSOCIATION #1400. One Yonge St., Toronto, ON M5E 1J9 Tel: (416) 363-7261

CANADIAN FLEXIBLE PACKAGING INSTITUTE #1400 One Yonge St., Toronto, ON M5E 1J9 Tel: (416) 363-7261

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CANADIAN RESTAURANT & FOODSERVICES ASSOCIATION 80 Bloor St. W., Ste. 1201, Toronto, ON M55 2V1. Tel: (416)
923-8416 or 1-800-387-5649 Fax: (416) 923-1450

CANADIAN TRUCKING ASSOCIATION National Office, #300, 130 Albert St. Ottawa, ON, K1P 5G4 Tel: (613) 236-9426

CANADIAN WAREHOUSING ASSOCIATION P.O. Box 125, Oshawa, ON L1H 7L1 Tel: (416) 436-8801 Fax: (416) 436-0991

CANADIAN WOOD PALLET AND CONTAINER ASSOCIATION P.O. Box 640, Pickering, ON L1V 3T3 Tel: (416) 831-3477 Fax: (416) 831-3477. Contact: Gordon Hugues, Exec. Dir

CONSUMERS' ASSOCIATION OF CANADA Box 9300, Ottawa, ON K1G 3T9. Tel: (613) 723-0187, Fax: (613) 723-9783

DAIRY BUREAU OF CANADA 20 Holly St., Ste. 400, Toronto, ON M4S 3B1. Tel: (416) 485-4453 Fax: (416) 485-1874

DAIRY FARMERS OF CANADA 75 Albert St., Ste, 1101, Ottawa, ON, K1P 5E7, Tel: (613) 236-9997, Fax: (613) 236-5749 Contact: Richard Doyle, Exec. Dir

FLAVOUR MANUFACTURERS ASSOCIATION OF CANADA 24 Blackdown Crescent, Etobicoke, ON, M9B 5X6 Tel: (416) 233-0007

GLASS CONTAINER COUNCIL OF CANADA 221 Moore Ave., Toronto, ON, M4G 1C6, Tel: (416) 423-4882

PACKAGING ASSOCIATION OF CANADA 111 Merton St., Ste. 201, Toronto, ON M4S 3A7, Tel: (416) 485-7812. Toll-free; 1-800-387-8875 Fax: (416) 487-2217 Contact: Alan Robinson, executive director

QUEBEC BRANCH OFFICE C.P. 52, Roxboro, PQ H8Y 3EB, Tel: (514) 683-4327 Fax: (514) 683-2840

PLASTIC FILM MANUFACTURERS ASSOCIATION OF CANADA 1262 Don Mills Rd., Ste. 104, Don Mills, ON M3B 2W7, Tel: (416) 449-3444, Fax: (416) 449-5685. Contact: Charmian Entine, Mgr Market Councils

RETAIL COUNCIL OF CANADA 210 Dundas St., W. Ste. 600, Toronto, Tel: (416) 598-4684 Fax: (416) 598-3707

THE SOCIETY OF THE PLASTIC INDUSTRY OF CANADA 1262 Don Mills Rd., Ste. 104, Don Mills, ON M3B 2W7. Tel: (416) 449-3444, Fax: (416) 449-5685. Contact E.R. Ron Evanson, president

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