

The logo for Promar International features the word "promar" in a lowercase, teal-colored serif font. The letter "o" is replaced by a red sphere with a white highlight, which is partially enclosed by a thin, teal-colored orbital ring. To the right of "promar", the word "International" is written in a smaller, teal-colored sans-serif font.

promar International

STRATEGIC STUDIES DIRECTORY

**Branded food and beverage
agri-food and agri-inputs**

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STRATEGIC STUDIES DIRECTORY

Branded food and beverage, agri-food and agri-inputs

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BRANDED FOOD MARKETS AND ISSUES

UNITED STATES

Generation Y: Winning snack strategies

Published June 2001

With their consumer confidence and their teeming numbers, Generation Y is the single-largest marketing age group out there, with decades more marketing potential ahead of them than the Baby Boomers; their actual numbers total between 60 and 70 million, second only to the Baby Boom in sheer numbers. Our new study, GENERATION Y: Winning snack strategies, analyzes young Americans and how they interact with snack foods, and it will offer strategies to help you succeed with these critical customers for whom snacking is a way of life.

Beyond the share battle: Reinventing categories for top-line performance and profit

Published March 2001

Let's be honest. Food and beverage companies in the US and Europe face the same struggle on many, if not most of their brands: mature categories, where the only gains come from share wars that depress both margins and profits. Could it be different? What about category growth? This study will distill lessons from companies both inside and outside the food and beverage industry to reveal paths to category transformation and growth. Derive inspiration and ideas for reinvigorating your products from companies that have successfully stemmed or reversed declines.

The curse of abundance: What the crisis in children's nutrition means for food and beverage companies

Published April 2001

Ironic, isn't it? In the midst of plenty, US children are facing a nutritional crisis. Childhood obesity, chronic dietary deficiencies, and sensitivity to many common ingredients in processed foods have become important concerns for Americans, particularly for parents and experts in child health. Inevitably, the food industry will be expected to come up with quick "solutions" to nutrition problems that have evolved over decades. This study will give industry executives an understanding of the risks they face from a new "epidemic of excess," both today and in the years ahead. Moreover, it will provide companies with strategies designed to defuse criticism and respond positively to a serious problem.

¡Cuba, sí!: Opportunities for US food and agriculture

Published December 2000

Since the US implemented an embargo on trade with Cuba in the early 1960s, Cuba has obtained food and agricultural imports from distant countries. However, recent steps by US legislators towards easing trade restrictions suggest that the US may once again be able to export food and agricultural products

to Cuba. This study will help US companies pinpoint opportunities in Cuba by equipping them with an understanding of the condition of the Cuban economy, the structure of its food marketing system and the country's current foreign investment deals and business alliances. In addition, they will learn what impact Cuban exports of sugar, citrus and other products might have on the US market.

The upside of downscale: Marketing to low-income US food consumers in the decade ahead

Published December 2000

Low-income does not mean low-impact. Families with annual incomes below \$35,000 represent over 40 percent of retail food sales. Yet this large and powerful group of consumers is frequently overlooked by food marketers and often priced out of benefiting from key innovations. Can food companies afford to continue this neglect? The study evaluates how this consumer demographic will determine the fate of many brands - and potentially entire companies. In addition to gaining a new appreciation for this audience, executives in food and beverage companies will get a practical framework for assessing the best ways to incorporate the needs of lower income consumers into an overall growth strategy.

Food doctors: The future of nutraceuticals in the United States

Published April 2000

Since the term "nutraceutical" was first coined in 1984, it has been a touchstone for innovation across the food, supplement and pharmaceutical industries. The key to success is *pace*. Companies must develop and market innovative products that respond to changing patterns in consumer demand, but at the right time and in the right way. By analyzing the forces that will shape tomorrow's market, including research and product innovation, regulation, industry consolidation, and consumer demand, we offer a realistic picture of the sector's potential growth. In addition, we help companies find where they may fit in an industry being reshaped by current players and new ones, such as pharmaceutical manufacturers. Finally, by assessing the strength of demand and motivations behind consumer behavior over the next decade we help companies capitalize on the opportunities and avoid the much-publicized pitfalls that have bedeviled the market to date.

Orienting the us food and beverage market: Strategies for targeting Asian Americans

Published June 2000

An often-overlooked target group, Asian Americans represent an area of opportunity for the forward-looking food company. A fast-growing, sophisticated audience with tremendous buying power, Asian Americans have the highest income levels for any ethnic group in the United States. This study equips companies with an understanding of the six largest Asian American sub-groups (Chinese, Japanese, Koreans, Indians, Vietnamese and Filipinos) and provides strategies for that manufacturers, retailers and foodservice operators can use to market successfully to these emerging segments. And because the world is not standing still, this study also helps food and beverage executives understand how the growing Asian community will affect the US food industry overall.

From subculture to supermarket: Organic foods grow up

Volume II: The new market for organic and organic 'lite' foods

Published October 1999

Consumer demand for ecologically friendly, good-for-you foods and beverages has spurred tremendous growth in the US organic market in recent years. But will this growth continue? Who will buy organic products in the future? Where will they buy them—and why? By examining the evolution of the organic market, as well as consumer trends, regulatory issues and industry responses, this study prepares companies to understand where organic products are headed in the future. Promar completes its look by prescribing effective manufacturer strategies for tapping this rapidly expanding market.

The concerned consumer in the United States: Finding opportunities in anxiety

Published March 2000

Is our food out to get us? What kinds of food—and companies—can we trust these days? American consumers are growing increasingly concerned with the safety, health, environmental, and ethical aspects of what they eat, drink, and serve to their families. But are these short-lived obsessions or lasting anxieties? This study will explain to food and beverage executives why these consumer worries have gained momentum in recent years and which ones companies must be concerned with in the future. Taking an in-depth look at five main product trends and issues, including genetically modified foods, functional foods, organic/natural foods, vegetarianism and ethical business practices, we pinpoint what threats and opportunities these spell for food and beverage companies. Finally, we offer strategic recommendations that will allow companies to profit from this major shift in consumer demand.

Swimming with sharks: How mid-sized food and beverage companies can survive and prosper in an era of consolidation and rapid change

Published February 2000

With merger mania flourishing in the food and beverage industry, how can the mid-sized company survive and grow? Looking at similarities and differences among mid-sized companies across market sectors, this study gives companies between \$100 million and \$1 billion an unvarnished look at what the future holds for them and what development options they have. *SWIMMING WITH SHARKS* details the rules by which the game will be played and won in the future and provides concrete examples of companies that are successfully meeting these emerging challenges. Analyzing the strengths and weaknesses of different company types, the study charts strategies that mid-sized manufacturers can deploy to compete successfully in an environment that generally favors larger players.

When they're 64: Profiting from the Baby Boomer food consumer to 2010

Published July 1999

As 78 million Baby Boomers enter the "pre-retirement" life stage, these demanding, technologically adept, and highly individualistic consumers will form the leading edge of permanent change in the US food industry, while also transforming the role of the mature food consumer. This study equips food

company executives with a model for understanding what will spark Boomer interest and excitement in the future. *WHEN THEY'RE 64* also outlines specific strategies for all areas of company operations—from marketing communications to distribution, production, and even business organization—that will enable food manufacturers, retailers, and foodservice providers to maximize the Baby Boomer opportunity.

Serving the us drinks consumer to 2008: Strategies for tomorrow's alcoholic beverage businesses

Published January 1999

The US alcoholic drinks consumer is changing, and changing fast. In response to the growing ethnic base, an aging population, a widening gap between rich and poor, growing individualism, and advancing technology, our investigation shows beverage executives how their consumer base will change, what their consumers will want and expect, and what companies must do in order to stay relevant and continue growing a profitable operation. Recognizing the unique circumstances facing beer, wine, and spirits players, *SERVING THE US DRINKS CONSUMER* articulates winning strategies for each of these sectors, as well as multi-sector players.

Riding the us ethnic food tide: Strategies for manufacturers into the new millennium

Published December 1998

With mainstream consumers accounting for 75% of ethnic food sales today, ethnic foods are far from the obscure realm of immigrant groups in urban centers. Moreover, ethnic foods are growing at a robust clip, providing a bright exception to the anemic growth found in most food sectors. Our report evaluates a range of different cuisines and explores both their characteristics and future prospects. More importantly, however, it offers a *structured framework* for approaching this huge—but-complex opportunity by identifying development patterns common to all ethnic cuisines and specific strategic implications needed to develop, produce, distribute, and market ethnic foods.

Snack food company profiles: Identifying strategies for success to 2008

Published December 1998

This crucial and useful study provides a structured portrait of the US snack food market and industry today and how they will change in the years ahead. Within this context, it offers 19 strategic profiles of US snack food companies, evaluating how they have fared in their competitive environment, the direction in which they are headed, and the direction they need to take. These illustrative profiles provide lessons applicable to other industry players.

Functional foods and nutraceuticals: The US opportunity, 1997-2007

Published January 1998

Consumer demand for health-enhancing foods is rapidly growing. This study analyzes the context of the nutraceutical market development; it identifies potential market opportunities and pitfalls. It is the first study to address strategic issues relating to nutraceuticals to provide senior decision makers with the information and insight needed to excel in this dynamic market.

LATIN AMERICA

Brazil coffee to 2010: Implications for global coffee players

Published July 2001

Brazil is the world's most influential coffee player: it is the largest producer and second-largest coffee consuming country. As Brazil's producers adjust their practices in a major shift from price to quality, they will have a major impact on the global market over the next ten years. This study will provide an in-depth analysis of the dynamic changes taking place in Brazil and how these will affect the domestic and global markets; it will then focus on the resulting strategic implications for coffee players worldwide, from producers to roasters to traders.

The future of snack markets in Latin America

Published June 2001

As a growth sector in a growing market, Latin American snacks deserve attention from globally minded food companies with an eye for the future. Different countries are moving at different rates away from traditional home-cooked meals toward "anytime, anywhere" patterns that include snacks and mini-meals. Nor is the snack market limited to the upper income brackets. As incomes grow throughout Latin America, today's have-nots will be able to afford the low-key indulgence that snacks offer. Where are the best opportunities for which kinds of products? And what companies are likely to succeed in this fast-changing environment?

Food distribution in Mexico to 2010: Strategies for expansion and entry

Published February 2000

Distribution is a major headache for any food manufacturer doing business in Mexico. This study analyzes food distribution in Mexico today, from the major markets to rural areas, and across every other critical dimension, from product segment to price points. More importantly, it offers companies a chance to see what has—and hasn't—worked to date by exploring comprehensive case studies of key players. Understanding today is not enough, however, in a market undergoing dramatic change. To enable food companies to compete effectively in the decade ahead, we examine how distribution will continue to evolve and what different players must do to achieve top results in their future distribution efforts.

Food in South America: Changing consumers & markets present new opportunities

Published August 1999

With 250 million consumers, increasingly stable democratic economics, rapid economic growth rates, and strong IMF backing, South America has many growing possibilities for food retailers. Prepared with the food executive in mind, this study develops a big picture view of the way in which eating habits will change in South America over the next decade. It aims to highlight and prioritize the country and product opportunities that will emerge, and provide large food manufacturers, domestic and international, with strategic advice to help them capture these opportunities.

Beverage markets in Latin America to 2010: Change, challenge, and opportunity

Published March 2000

Seen as having increasingly stable, democratic market economies with growing per capita incomes, a huge and growing regional market comprising over half a billion people in 10 years, 50% of whom will be between 18 and 30 years of age, and being home to two of the largest beverage markets in the world, Latin America holds great potential for expanding its beverage markets. This study starts by considering consumer profiles and market size and segmentation in Latin America's five sub-regions; presents player types; analyzes the forces shaping the markets; and concludes by presenting strategies for success, and applying them in case studies to half a dozen beverage companies.

ASIA

The subcontinent in transition: A strategic assessment of food, beverage and agribusiness opportunities in India

Published April 2000

Remember when India could not produce enough food to feed its population? And it was at the bottom of foreign investors' priority lists for expansion? That time is long past. Today, India is virtually self-sufficient in food supply. All of this growth equals great opportunity. Our project clarifies the huge agricultural and food markets, as they exist today, explains how they will change and how, most particularly, they will develop over the next decade. Along the way, it identifies new opportunities and insights into the strategies that will be essential to effectively compete in the future environment of this dynamic country. This new study is aimed at key multi-national and Indian executives of food and beverage manufacturing companies, crop protection and seed companies, trading companies and other firms interested in expanding in or entering the Indian market.

Meeting the food distribution challenge in China: Food manufacturer strategy

Published March 2000

China has been the "waking dragon," the Promised Land, for many years, so how come it is so difficult to make money there? Is the promise just an illusion? Are we looking at a bottomless pit, rather than a pot of gold? This study from Promar goes behind and beyond mere description and data to advise distribution strategy for different international player types. Distribution will be the critical success factor in China - this report covers China's provinces and Hong Kong's prosperous gateways, development areas and interior regions. It includes distribution in various sectors: ambient, chilled, and frozen products, tea and coffee, and meal components and accompaniments.

Japanese nutraceuticals, functional foods and FOSHU: Opportunities in the world's leading market for domestic and multinational companies to 2010

Published November 1999

The nutraceuticals concept originated in Japan. In a country of 125 million people, functional food and drinks have become a very established market. And tomorrow, with the world's highest income and oldest population, it will become even more so. Our study identifies key product and market development trends and sales opportunities, defines and assesses key business expansion strategy options. The study also evaluates how Japanese progress may influence the US and Europe and serves as a guide to global nutraceutical development.

GLOBAL

Unleashing opportunities in global pet food: Strategies to 2010

Published August 2000

No longer content merely to have their day, dogs (and cats), consumers are going global with a demand for consistently satisfying and nourishing food. In the years ahead, stable emerging markets with growing per capita incomes are offering tremendous growth opportunities for pet food companies. And in mature markets in the United States, Western Europe and Japan, growth is strong in higher-margin added value products. On the downside, this extremely promising scenario is not a ticket for guaranteed future success. Pet food companies and other key players in this sector must also contend with some very real threats to business—most notably the trend toward consolidation on the supply side, and possible unsettling shifts in distribution structures. Analyzing the different forces affecting growth of the market, including industry consolidation and consumer demand, we help you understand how the market is likely to grow, how it will be structured, and what consumers will be seeking. Finally, we provide a framework for assessing the best way to take advantage of opportunities in the global pet food marketplace.

Global snack food markets: Strategies for growth

Published February 1999

An assessment of national and product opportunities for the snack food industry across the world. The study assesses the core drivers for change in a global snack food environment, i.e. Macro forces such as economic change and political influences, the global consumer, global distribution and the evolving snack food industry in a global market context to 2010. A model to assist in the identification and prioritization of opportunity is then presented, along with separate analyses, each specific to an industry player type, where for each we assess the specific opportunities and challenges.

AGRIFOOD AND AG INPUTS MARKETS AND ISSUES

US & CANADA

Reaping the cyber harvest: Implications of e-commerce for agriculture

Volume 1: The future of selling ag inputs over the Internet

Published July 2000

After a brief introduction to the Internet revolution, this study combines profiles of the major players in Internet ag input sales with a psycho-demographic look at farmer customers and their attitudes toward the Internet. Focus groups with farmer leaders and interviews with industry players ground this information in grassroots reality. The study ends with a detailed look at the opportunities and challenges facing this emerging market, as well as ways in which these challenges can be overcome and the opportunities can be grabbed.

Reaping the cyber harvest: Implications of e-commerce for agriculture

Volume 2: The future of crop marketing

Published August 2000

The Internet is fundamentally changing traditional ways of thinking about – and conducting business. Despite a solid foundation of long-standing relationships, players in the crop-marketing world are by no means sheltered from this e-commerce revolution. eHubs and other agricultural dot.coms are emerging at "Internet speed," and offer new opportunities – and threats – for those operating throughout the crop marketing chain. This study will identify and examine the most important challenges in the new agricultural economy through detailed company profiles and the use of ag industry and farmer Focus Groups.

Reaping the cyber harvest: Implications of e-commerce for agriculture

Volume 3: The future of B2B ingredients markets

Published December 2000

While food ingredient B2B hubs continue to promise the world, many now accept that e-commerce marketplaces will not provide the magic solution. At the same time, most players in the food ingredient industry realize that they must adopt an e-commerce strategy and are asking – how does my company approach the Internet? This objective report sorts through the static and provides food ingredient buyers and sellers with what they need to know to implement a successful e-commerce strategy. This analysis is based on in-depth discussions with food ingredient buyers and sellers, detailed profiles of the dot.coms, and extensive analysis of the technical challenges – in language that you can understand

Mapping the future of precision agriculture: Opportunities for ag input and equipment manufactures and retailers

Published January 2000

With each passing day, farmers are increasingly technologically savvy. Significantly, many farmers will use precision agriculture tools to manage the farm. Precision agriculture presents ag input and machinery manufacturers and retailers an opportunity to offer farmers the much-needed service of clear, concise and relevant information as well as application and technology services that will build a stronger relationship with the farmer customer. Our report clarifies current and future consumer needs, assesses specific market opportunities, and equips companies with real-world strategies to build relationships and profits.

From subculture to supermarket: Organic foods grow up

Volume I: Meeting supply side realities

Published September 1999

Organic food – once the domain of a small group of core consumers – is now a \$4.2 billion market. With a dizzying double-digit growth rate (20-24%) and 33 million consumers already on board as purchasers, organic foods have gone mainstream with a vengeance. Can the market sustain this rapid growth in demand? And if demand does persist, is the supply chain capable of keeping pace? The first volume of our two-part study analyzes the supply-side issues associated with organic foods. Among other things, we look at how companies must develop a steady pipeline of quality products, the steps involved with or anticipated for the organic certification process, and the extra costs associated with the organic supply line.

Farmaceuticals and pharming: The value chain meets the biotechnology revolution

Published April 1999

Will the day come when a "genetically modified" label on a can of soup or a fruit beverage will be as demanded by consumers as the "fat free" label is today? The future of biotechnology promises products that will hold benefits for both farmers and food consumers. Pharmaceuticals - the next wave of modified crops - will be genetically altered to provide health benefits beyond basic nutrition, and will have the potential to provide vaccines in the form of food rather than shots, or multivitamins without the pill.

Our study is a long-term strategic assessment that details the future of pharmaceutical products by looking at the problems and opportunities offered in this next surge of the biotechnology revolution.

The future of farm input distribution in the United States and Canada: Strategies for agrochemicals, seed, fertilizer, feed, and finance

Published November 1998

Are the old ways the good ways? Not anymore. The farm input business is changing in a dramatic fashion, and established distribution channels are rapidly shifting. With fewer, larger players at all levels of the chain, new relationships are being forged, as old ones are broken. The focus of this study is the evolving distribution system for the major inputs to field crop production – seeds, fertilizers, agrochemicals and finance. In addition, the report analyses factors such as how farmers purchase crops for feed purposes, application services, and livestock genetics.

LATIN AMERICA

Brazil coffee to 2010: Implications for global coffee players

Published July 2001

Brazil is the world's most influential coffee player: it is the largest producer and second-largest coffee consuming country. As Brazil's producers adjust their practices in a major shift from price to quality, they will have a major impact on the global market over the next ten years. This study will provide an in-depth analysis of the dynamic changes taking place in Brazil and how these will affect the domestic and global markets; it will then focus on the resulting strategic implications for coffee players worldwide, from producers to roasters to traders.

South American crop protection and seed markets to 2010: Opportunities, risks, and strategies in a continent undergoing dynamic farming change

Published July 1999

South American consumption of agrochemical products totaled \$4.4 billion in 1998 vs. only \$2.0 billion in 1990 – a growth of over 10% per year. Add to this a \$2.3 billion seed business with enormous improved and GM seed potential and the market represents an opportunity second only to that of the US. With such great potential for growth, it's important to know where the possibilities are in this market. This report evaluates the prospects for agrochemicals and seeds, assesses how these markets will change in a new biotech world, and helps company management formulate strategies for operating on this dynamic continent.

ASIA

The subcontinent in transition: A strategic assessment of food, beverage and agribusiness opportunities in India through 2010

Published April 2000

Remember when:

- India could not produce enough food to feed its population?
- India's economic growth was minimal?
- India was at the bottom of foreign investors' priority lists for expansion?

That time is long past. Today, India is virtually self-sufficient in food supply. All of this economic growth equals great opportunity. Our project clarifies the huge agricultural and food markets, as they exist today, explains how they will change and how, most particularly, they will develop over the next decade. Along the way, it also identifies new opportunities and insights into the strategies that will be essential to effectively compete in the future environment of this dynamic country. This new study is aimed at key multi-national and Indian executives of food and beverage manufacturing companies, crop protection and seed companies, trading companies and other firms interested in expanding in or entering the Indian market.

Creating value with oilseeds in China: A strategic assessment to 2009 of the challenges and opportunities for vegetable oil, protein meal and oilseeds

Published March 1999

In recent years, growth in China's demand for oilseeds has been absorbing much of the world's annual production increases. Rapidly rising incomes, greater urbanization, changing lifestyles, and a flourishing livestock industry will all generate strong demand well into the 21st century. Our investigation assesses areas of the Chinese oilseed industry and market development potential never appraised before. It evaluates the major oilseeds (including soybeans, rapeseed, cottonseed, sunflower seed, and groundnuts) and their relative competitive strengths and weaknesses in China. And it analyzes the changing demand for their products - edible oil, including palm oil; meal for livestock and poultry; and oilseed-based foods.

GLOBAL

Reaping the cyber harvest: Implications of e-commerce for agriculture

Volume 1: The future of selling ag inputs over the Internet

Published July 2000

After a brief introduction to the Internet revolution, this study combines profiles of the major players in Internet ag input sales with a psycho-demographic look at farmer customers and their attitudes toward the Internet. Focus groups with farmer leaders and interviews with industry players ground this information in grassroots reality. The study ends with a detailed look at the opportunities and challenges facing this emerging market, as well as ways in which these challenges can be overcome and the opportunities can be grabbed.

World sweetener players: A strategic assessment of future competitive conditions in refined sugar and starch sweetener markets

Published September 1998

This study of world sweetener players looks at the forces shaping national and international sweetener markets over the coming decade, profiles the leading marketers of sugar and other sweeteners, and discusses the distinguishing features of the companies that are emerging as leaders in this sector.

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