

RESEARCH UPDATES

The Effects of a Wholesale Fruit and Vegetable Auction on Produce Marketing and Distribution

Barbara James, Associate Professor; Thomas Blaine, Assistant Professor; and Randall James, Associate Professor: Ohio State University Extension

In 1992 a wholesale auction was established in Geauga County, Ohio to market produce for an increasing number of fruit and vegetable producers in the county. Creation of the auction was thought to constitute a major role in the economic development strategy for the county, since it provided a convenient mechanism for the marketing of fresh produce. This produce could be efficiently grown by local producers (a large percentage of whom are Amish) who possess the necessary labor and land resources. The function of the auction would be to help them overcome a traditional marketing barrier, access to buyers.

The Ohio State University Extension has developed an excellent relationship with the individuals involved with both buying and selling at the auction. From early in the auction's inception Extension provided educational meetings on marketing and production methods. Extension also assisted the auction owner in making contact with potential clients.

Purpose Now that the auction is well established, it is appropriate to examine its impact upon fruit and vegetable production. It is likewise appropriate to assess its impact upon Geauga County's food marketing and distribution system as well as the economic and social effects on the businesses and families involved.

Objectives and Methodology The findings from this study will provide estimates of current fruit and vegetable production in Geauga County, which will be compared to production in 1991, taken as a pre-auction baseline level. The dimensions of total output, revenue, composition of output, and the number of fruit and retail businesses will be quantified. We intend to identify what economic and social factors other than the

auction have provided the incentives for establishing or expanding fruit and vegetable related enterprises in Geauga County.

A list of vegetable consignors and buyers will be obtained from the owner of the wholesale produce auction house. An original mail questionnaire will be developed, reviewed, and modified by a panel of Ohio State University community development, family and consumer science, and agricultural researchers. The instrument will be field tested by a sample of fruit and vegetable producers and retailers from a neighboring county. We will use data from the survey to develop a series of frequency distributions for the variables involved, and use appropriate statistical procedures (t, F, ANOVA) in order to quantify the role of the auction in Geauga County.

The Feasibility of Establishing a Fresh Packing Facility for Selected Produce Items in Delaware

Richard J. Bacon, Associate Scientist; Ulrich C. Toensmeyer, Professor; and Carl L. German, Extension Specialist. Department of Food and Resource Economics, University of Delaware.

Concern within the agriculture community has arisen because of the limited market access for small fresh produce growers. At the same time, wholesalers and retail chains in the food industry continue to grow in size and power, and as a result, prefer to purchase their produce from as few sellers as possible. This results in more difficulty for small producers to access these commercial marketing channels. Consumer reaction to locally produced vegetable has been positive for some products. Taken together these observations suggest that Delaware producers are facing increasingly adverse marketing opportunities at a time when the state's consumers represent a significant market. An alternative solution to assist both growers and consumers, is to ana-

lyze the feasibility of developing a centralized cooperatively operated packing facility.

Objectives The overall objective is to determine the economic potential of a packing house facility for Delaware producers. Specific objectives are as follows:

1. Develop representative unit costs for packing selected produce items.
2. Determine the most economical combination of equipment to fresh pack selected produce items.
3. Determine the effects of several different production seasons on profit potential.
4. Use FABSIM to analyze the feasibility of and make recommendations for planning a new Delaware packing facility.

Procedures Three fresh produce items are being considered initially for the central packing facility--potatoes, tomatoes and bell peppers. A computer simulation model (FABSIM) Financial Agribusiness Simulator is being used in this study. It is a comprehensive, firm-level, dynamic and stochastic capital budgeting model. It provides detailed results regarding the economic and financial viability of the representative packing facility. Financial conditions that were specified are the minimum cash reserve, debt to asset ratio at the beginning of the firms operation, solvency ratio, interest and discount rates. Five variables were studied; net present value (NVP), internal rate of return (IRR), the probability of economic survival, annual net income, and the probability of economic success.

Patronage at a Farmer's Market: An Analysis of Knoxville Area Residents: Perceptions and Trips to the Outlet

David B. Eastwood, Professor; John R. Brooker, Professor; and Morgan D. Gray, Computer Analyst: Department of Agricultural Economics and Rural Sociology, University of Tennessee.

Farmers' markets, in order to be successful retail outlets, must develop marketing strategies based on consumers' perceived strengths and weaknesses of the respective facilities. A prelimi-

nary analysis of a survey of residents near a relatively new farmers' market is described. In the spring of 1993 a food shopper questionnaire was developed to obtain information about attitudes, perceptions, and socioeconomic characteristics of a random sample of residents who were mailed a survey. A total of 344 useable questionnaires were returned out of 1,000 mailed.

Characteristics of respondents were compared to other surveys of fresh produce consumers. The results were consistent with these surveys of food shoppers and of fresh produce consumers. The majority were female, over 25 years old, and from higher income groups.

Nearly all the respondents (92 percent) had heard of the market. Radio was the most frequently cited source, and its response rate was nearly twice that of television, which was closely followed by newspaper. Just over half the respondents indicated they had visited the outlet the previous year, and of those who visited the facility, over three-quarters indicated they made one to five visits in 1992. Aspects of the market that are hard for management to address and were identified by respondents as reasons not to visit the market were too far to drive, equal or better quality available elsewhere, and do not buy enough to make the trip worthwhile. The most frequently cited problem areas that could be addressed were lower prices, more produce variety, and consistent high quality.

The descriptive statistics provide a framework for developing marketing strategies to promote the market. Newspaper and radio advertising have the greatest media impact. When coupled with food shoppers using price information in determining where to buy, newspaper and radio advertising should contain price information. Radio ads could also encourage people while on the road to drive by the outlet. Increasing the variety of produce should be attempted. Ads could include information about the types of produce on sale.

Several strategies can address the distance problem. Food shoppers need to feel that a visit is worth the trip. A key part is to keep prices below those of supermarkets because patrons have to go out of their way to get to the outlet. Freshness and quality should be emphasized.

Are Private Label Products Increasing in Strength at Supermarket Grocery Retailers in a Large Urban New England Standard Metropolitan Statistical Area

James J. Corbett, Associate Professor, Department of Marketing, Merrimack College, North Andover, MA.

Introduction Almost all brand name products are being affected by the growth in private label products. Some supermarket grocery retailers feel that private label products enhance their image as providers of good values and give them prime stocking locations. Furthermore, what gets some retailers excited about private label products is their ability to create customer loyalty through offering greater selection.

Purpose of this Study Some say that supermarket grocery retailers are re-focusing their attention on private label products. The purpose of this study is to examine the strength of the private label products in a specific market area.

Focus of this Study The focus of this study will examine the Standard Metropolitan Statistical Area (SMSA) of Boston, Massachusetts and the strengths of private label products in supermarket grocery retailers in this specific market area.

Methodology The approach of this study will take the form of:

1. A review of the literature.
2. A questionnaire directed at the supermarket shoppers.
3. Telephone interviews with food industry personnel.

A Consumer Survey Concerning Their Attitude and Opinions of Products and Services Provided by Delaware Direct Market Operators

Ulrich C. Toensmeyer, Professor; Carl L. German, Extension Specialist; and Richard J. Bacon, Associate Scientist: Department of Food and Resource Economics, University of Delaware

Direct marketing is a viable alternative for marketing fresh produce. It provides an outlet for farmers to sell their produce directly to consumers, supplying them with a fresh, high quality product, while receiving a profitable return. Direct marketing provides the producer an alternative marketing outlet for his/her fresh produce, thereby capturing a larger share of the consumer food dollar.

The Direct Marketing industry has matured a great deal in Delaware since 1981, when the last consumer survey was conducted. This will provide updated information on customers attitudes towards the Direct Marketing Industry in Delaware. The information provided will be valuable not only to the market operators and or farmers who supply them, but also for the consumer who is concerned with buying the best for his/her dollar.

Objectives

1. Determine Delaware consumers' view concerning direct markets and their products and services within Delaware.
2. Determine what expectations and needs of the consumer must be met to maintain a viable operation.
3. Evaluate consumer recognition of Delaware produced produce.
4. Compare consumer responses to those given in 1981.
5. To utilize this information as a basis to make recommendations for improvements to direct market operations.

Procedures Ten thousand mail surveys will be sent in October-November 1995 to Delaware residents randomly selected via telephone directories. The sample will be subdivided by counties according to their respective population base related to the State total. A second mailing will be made two to three weeks after the first. The data will be analyzed and comparisons will also be made where possible with the results from our 1981 survey.

Analysis of an Educational Program on Attitudes Toward Irradiated Seafood

Roger Hinson, Department of Agricultural Economics and Agribusiness; Linda Andrews, Robert Grodner, and Anna M. Key, Department of Food Science, Louisiana State University

Food irradiation helps preserve foods by killing pathogens and parasites that cause food-borne illness. The process is functionally competitive with canning or pasteurization. In the irradiation process, products are treated with energy waves, like heat or microwave; however, gamma radiation is a cold treatment and does not have the potential adverse impacts on foods of heat treatments, or the residues of chemical preservatives.

While irradiation has advantages as a technology, it has drawbacks that stem from fear of the material used as the gamma source. However, national and international agencies, including the World Health Organization, USDA, American Medical Association, and others, have approved the safety of the technology, and the process is in use in 37 countries, including France and Israel. Current US applications mostly are on spices. However, many products in the seafood industry could benefit from irradiation. Molluscan shellfish including crab products, oysters, shrimp and crawfish are examples. There is particular concern about pathogen levels in raw oyster, particularly in the summer months. A proposed FDA rule would close the sale of in-shell oysters from April to October, and label all shucked oyster "not to be eaten raw". Reports of illnesses have resulted in significant declines in consumption and in price, and in business instability among producers of these products.

Working with the Louisiana Seafood Promotion Board and selected seafood marketing companies, a consumer education program on the irradiation process and its benefits (produced at Purdue University) will be conducted. An evaluation of changes in attitude resulting from exposure to the program is the primary objective. A sample of consumers will be drawn from alternative population subsamples, and the educational

program will be presented. Changes in opinions and attitudes after exposure to the educational program will be documented and compared to pre-exposure levels. Appropriate statistical analysis will be conducted illustrate differences among subgroups of the population.

Seafood Consumption by Florida Residents

Dr. Robert L. Degner, Professor in the Department of Food and Resource Economics and Director of the Florida Agricultural Market Research Center, University of Florida; and Dr. Charles M. Adams, Professor in the Food Resource Economics Department, University of Florida.

This study provides improved estimates of per capita seafood consumption by Florida residents in general and for population subgroups of particular interest. Estimates are also reported by seafood species, and the proportions of each caught recreationally are documented. these findings are of interest to seafood wholesalers, and food retailers, as well as health professionals concerned with quantities of seafood consumed by various consumer subgroups.

Telephone interviews of Florida residents were conducted on constant quota basis throughout a 52 week period beginning March 15, 1993 and ending March 13, 1994.

A sample of 8,000 households was selected via a random digit dialing procedure. The sample was stratified by county, with each county represented in proportion to its population. A randomly selected adult in each household was asked for detailed away-from-home seafood consumption data for the previous seven days. If the primary meal preparer was available, this person was asked to provide at-home seafood consumption data for the previous week for every member of the household. Thus, at-home and away-from-home consumption data were obtained for 8,000 randomly selected adults (RSA's) and at-home consumption data were obtained for 15,672 household members.

The questionnaire used for the telephone survey utilized an aided recall approach. Portion size recall was based upon familiar food-related

items, i.e., a slice of sandwich bread and an 8 oz. beverage cup.

Total annual per capita seafood consumption was estimated to be 16.80 kg (36.97 pounds) for RSA's. Adults consumed approximately half of their total seafood at home and half away-from-home. Finfish represented approximately 80 percent of total seafood consumption. Total annual consumption was higher for male than female RSA's. Asian and American Indians reported the highest levels of seafood consumption, followed by Blacks, Whites and Hispanics. Total annual consumption of seafood by RSA's was found to be highest for ages 35-49. Consumption for ages 18-34 and 50-64 were approximately equal, and the lowest consumption was found for respondents 65 years of age and older.

Using Supermarket Scan Data to Develop Product Specific Marketing Strategies: The Case of Flour

M. Gray, Professor; D. Eastwood, Professor; and J. Brooker, Professor: Department of Agricultural Economics, University of Tennessee

Many of today's modern supermarket chains collect and maintain store level sales data from checkout scanners. However, the full potential of scan data is often not reached by the supermarket or the vendor. This study represents one of many in an ongoing research project that began over seven years ago.

By using scan data and tracking the sales of UPC specific foods, data can be captured and used to form a time series of sales that incorporates information on seasonality, trends, and true sales complements or substitutes. With this tracking scheme, analyses are permitted of vendors own pricing and marketing activities along with those of their competitors.

This paper illustrates how such analyses can be completed using a product of manufactured flour as an example. The problems of identifying the competing products in a supermarket scan data set, the estimation of demand equations, and the estimation of own and cross price elasticities are outline in the paper. Inferences are then drawn

using simple descriptive graphics in an interactive framework to show vendor sales and marketing staff how to plan market pricing and timing strategies.

Retail-Wholesale Pricing Relationships: A Case Study with Selected Fresh Vegetables

John R. Brooker, Professor; Brian C. Carver, Graduate Research Assistant; David B. Eastwood, Professor; and Morgan D. Gray, Computer Analyst: Department of Agricultural Economics and Rural Sociology, University of Tennessee, Knoxville, TN

As vegetable production has moved toward centralized areas of production, more marketing activities must be performed. This has logically led to an expansion of the retail-farm price spread. Average farm prices have also trended upward, but average retail prices have risen faster than average shipping point prices, resulting in a larger retail-farm spread. This has many participants within the vegetable industry concerned that the retail sector quickly responds with higher prices when faced with declining product supply, but, when product supply is increasing and grower returns are declining, retailers are less responsive in retail price adjustment.

Unlike agricultural products that are inputs to a manufacturing process, fresh vegetables require little transformation before they reach the consumer. For this reason, fresh vegetables are expected to show stronger price linkages between retail and farm levels. As a result, a price adjustment in the fresh vegetable market at one exchange point should have a more profound effect on prices at other exchange points than the same adjustment for a highly processed agricultural product. Knowledge of these retail pricing strategies is essential to understanding the reaction of a retailer to upstream price changes and the development of consumer expectations in response to upstream changes.

Past studies have tried to explain price movements within the vegetable industry in order to allow vegetable producers, wholesalers, and retailers to make more precise production, pricing, and inventory decisions. However, a major

weakness of these studies has been the use of average monthly prices to determine how prices at the retail level adjust to price changes at the wholesale level. Using monthly price averages has led to imprecise results, the inexactness of which is compounded by the perishability of fresh vegetables. Due to their short shelf-lives, the fresh vegetable planning horizons for retailers are much less than one month, which leads to a change in pricing and inventory strategies more than once each month. With the advent of retail scan data technology, weekly price data can now be tracked and gathered at selected locations.

A price-linkage model was used to determine the responsiveness of retailers to changes in the wholesale price. While the response of retail prices to wholesale prices is probably symmetrical in the long run, initial price responses may be asymmetrical or price changes may not fully pass through during the week in which they occur. The model allowed for asymmetric price responses and gradual price adjustments by specifying non-reversible functions and including lags of increases and decreases in wholesale prices and hauling costs.

Initial results indicate that retail prices adjust more fully to increases in wholesale price than to reductions in the wholesale price. Also, transmission of wholesale price increases to the retail level are spread over more weeks than the transmission of wholesale price reductions. However, among the nine vegetables included in this study, differing pricing strategies were revealed.

While the reaction of the retailer to wholesale price changes seem to indicate imperfect pricing efficiency, low R-square values indicate that wholesale price is not the only determinant of retail price adjustments. Retailers may run advertisements in which vegetables are "loss leaders." In such cases, the current weekly price will not reflect previous changes in the upstream price. Retailers may also include changes in labor, energy, advertising, and other variable costs in their pricing decisions. Although the results of this study seem to indicate that retailers are exhibiting monopolistic pricing behavior, one should remember that the retailer is also adjusting prices based on additional factors not included in this study. Therefore, all factors of adjustment must be considered in assessing the level of pricing

efficiency within the commercial fresh vegetable marketing channel.

Competition from Latin America and the Caribbean for U.S. Fruit and Vegetable Markets Post-NAFTA

J.E. Epperson, Department of Agricultural and Applied Economics, University of Georgia, Athens, GA

The North American Free Trade Agreement appears to have ushered in a new era of openness to markets in all of the Americas. Indeed, Latin countries are lining up to formally become a part of NAFTA. It has already been announced that Chile will be the next country to join, subject to agreement by all parties concerned. In anticipation of an eventual open trading block in the Americas many companies may already be seeking and developing new production and marketing liaisons. As a result, the location of production and the structure of markets may be radically altered.

Objectives In broad terms, the objectives of this study are twofold. One is to ascertain the extent of fruit and vegetable trade between Latin/Caribbean exporters and U.S. importers along with associated factors of economic importance. The other is to determine the kinds of changes that may be taking place and the expectations of changes in the future.

Procedure Mirror image survey instruments have been developed: one for Latin/Caribbean fruit and vegetable exporters in English and Spanish and one for U.S. fruit and vegetable importers. The survey is presently underway by means of fax with follow-up fax and phone. Preliminary findings suggest that considerable efforts are being made to develop new inroads in U.S. markets with major impetus coming from both Latin/Caribbean exporters and U. S. importers.

A Pilot Study of the U.S. Food Processing Industry's Plans for Participating in the People's Republic of China

R. R. Cangemi and R. H. Lopez, Pace University, White Plains, New York

China is experiencing an economic boom. Currently, the economy is growing at an annual rate of 12 percent even with its many problems. In 1993, it exported approximately \$100 billion worth of finished goods and components, up from approximately \$50 billion in 1989. In addition, foreign investment reached approximately \$60 billion in 1993, up from about \$5 billion in 1989. The growth of China's economy has increased the level of sophistication of products demanded by the Chinese. China is being transformed into a more capitalistic marketplace through decentralization (Hitt, et al). China, with its population of 1.2 billion people, offers potential new business areas of growth for U. S. food processing companies. In an attempt to understand the plans and concerns of the food industry for participating in China, a survey of the largest food processing companies in the United States was carried out.

Methodology Six identified provinces were covered in this study: Shanghai, Guangdong (Canton), Beijing, Hubei (Wuhan), Liaoning (Luda/Dalien) and Jiangsu (Nanjing). During the second quarter of 1995, a mail survey of chief executive officers of the 100 largest food processing companies in the United States were asked to indicate if they were: (1) Currently participating and planning to continue to participate; (2) Not participating now but planning to participate over the next five years; (3) Not participating and not planning to over the next five years.

Each group of respondent was asked to identify their major concerns regarding carrying out business in these provinces, and for those doing business or planning to do business the means by which they are participating or will participate. The total food sales of these 100 companies represent approximately 65 percent of the value of shipments in food processing in the United States or approximately \$350 billion in sales in 1994.

Results Based on a 32 percent response rate of which half were usable, 44 percent are now

participating in China, 19 percent are planning to participate over the next five years and 37 percent are neither participating now nor planning to participate over the next five years. Sixty nine percent of the respondents requested a summary of the findings.

Major Findings and Implications Of the companies currently participating in China, 100 percent of them are carrying out business in Shanghai and Guangdong (Canton), 86 percent in Beijing, 29% in Hubei (Wuhan), 14% in Liaoning (Luda/Dalien) and Jiangsu (Nanjing). There are 24 incidents of joint ventures, 14 of exporting from the U. S. and four of exporting from Hong Kong and other provinces. The three top major concerns these companies have for doing business in China are lack of infrastructure (e.g., hotels, restaurants, roads, hospitals, schools and colleges), poor distribution system including packaging, waste and spoilage, and lack of a banking system and convertible currency.

For the companies planning to participate in China over the next five years, 100 percent of them are considering Shanghai, 67 percent are considering Beijing, Guangdong (Canton) and Hubei (Wuhan), 33 percent are considering Liaoning (Luda/Dalien) and Jiangsu (Nanjing). Their plans include 11 incidents of exporting from the U. S., eight incidents of exporting from the Philippines, Indonesia and countries to be determined, six incidents of independently owned companies and one joint venture. The most important major concerns that they identified are: lack of a banking system, poor distribution system, safety of investments, unstable province governments and lack of protective commercial laws including food safety supply.

For those companies not planning to participate in China their major reasons in descending order of importance are: more near term opportunities domestically and in other foreign markets, minimal experience with competition, their own lack of knowledge of opportunities in China and a limited market for their products.

References

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Muddling Thru in the 21st Century; The United States Food Industry System

Jarvis L. Cain, Professor of Agricultural and Resource Economics, University of Maryland, College Park, MD 20742.

Ready or not, the twenty-first century is about to burst upon us, with all its myriad of problems and/or panorama of hopes and dreams, depending upon your position in life and point of view. At one end of the spectrum, this pronouncement would be greeted with a yawn and a grumble: "Don't bother me, can't you see I'm up to my neck in alligators here?" At the other end, the new millennium offers the chance for a fresh start, with all the joys of anticipation and the boundless optimism to try new things and to conquer new worlds. Somewhere in the middle, between these poles, some of us sit and ponder; what will happen to the U.S. food industry and what will happen to our role in its growth and development?

In this discussion, we will examine a concept called "muddling thru" and its role in food industry growth and development, and will compare it to another concept called, for lack of better words, "re-thinking the system." The goal of this paper will be to blend the positives of these two concepts in order to strengthen systems wide planning for the United States Food Industry System during the first half of the twenty-first century.

Those seeking a precise, carefully worded definition here are going to be frustrated. The most focused definition the author has found is in Yergin and Gustafson's "Russia 2010 AD" (Random House, 1994). If more readings are necessary, look to Phillips', "Arrogant Capital" (Little, Brown & Co., 1994) and Kennedy's "Preparing for the 21st Century" (Vintage, 1993).

The author's perception of "Muddling Thru" has to do with taking the major elements of society and industry as given and applying a series of short term "fine tunings" and "re-engineering" to keep the ship (food industry) moving along a time continuum toward a rather hazy goal. It is "doing the best you can with what you've got." Change is possible here, but in a very controlled context of minimum disturbance to the other major players

already in place. It is a situation of "partial gridlock" with heavy emphasis on "playing the game" by established rules, and making our way carefully through the tangled jungle society has developed over the years. More about "muddling thru" will come forth as the paper unfolds.

Re-thinking the System In this process, we (1) set a time frame, (2) visualize, as best we can, the life style of our consumers and the place food will take in their lives, then (3) establish an objective for the food industry system and (4) design the most effective and efficient system to deliver the food products and services required. Sound familiar? (Testing, building and operating the new system completes the square).

We can choose 2020 AD as the time frame (25 years is long enough to build a new system). For life style, we must consider the possible decline in level of living for our society and its impact upon food demands of the population. As an objective we can use one from the past that is still good: "To provide adequate supplies of safe, nutritious food and food products, with desired services levels, at prices that reflect true value to United States consumers, at minimum total resource cost." (Cain, 1981, JFDR 12:3). In designing the new system it is crucial that we rethink all parts of the system to yield maximum effectiveness and efficiency. Some examples are shown in Nutrient Delivery System (Cain, 1973, JFDR 5:3); Food Distribution System, Inner City, USA (Cain, 1977, JFDR, 8:2); and Compute-a-Meal II (Cain, 1984, JFDR, 15:3). Some fascinating reading can be found in Alvin and Heidi Toffler's latest work: "Creating a New Civilization--Politics of the Third Wave" (Turner, 1994).

PLEASE NOTE: This is not an either/or proposition. These are two separate ways of looking at the development of a system. Much can be learned from the "muddling thru" to help in the job of "re-thinking" the system. Much "re-inventing of the wheel" can be avoided by careful analysis of the present system.

Our next step will be to ask the answer to a series of process questions -- each hopefully will shed some light on the subject at hand.

Why Do Most of Us Never Stop "Muddling"? Reasons can be outlined: (1) inertia; (2) narrow, short-range view; (3) fear of change;

- (4) fear of government action; (5) loss of control; (6) loss of job.

In spite of major individual changes, there are very strong vested interests throughout the system that most of us have no intention of challenging. They exist within and outside the system. For example:

<u>Within System</u>	<u>Outside System</u>
Production	Government
Processing	Universities
Distribution	Consultants
Consumption	Financial Community
	Equipment Manufacturers and Suppliers
	Organized Labor

The Message! "Don't Change the Basic Package." The challenge, as in all change projects, is to convince the vested interests that it is to their advantage to move to the new system. This is the point where many potentially useful change projects die.

Is "Muddling Thru" a Conscious Strategy? One could look at this process as a series of choices/non-choices and you just "go with the flow" at the time a decision is necessary. Many times this leads to short-range solutions to long-range problems and can waste precious resources. They also may end up being self defeating.

Is the Food Industry Better at "Muddling Thru" than the Rest of Society? With its size, concentration, market power, world-wide structure and political connections one would be tempted to say yes. Interestingly enough, these same reasons might well be advanced in support of "re-thinking the system." It really doesn't matter whether it can or not, the food industry is still constrained by the least common denominators that control the "muddling thru" in our society.

What are the Forces Moving Us Toward Total System Planning? The electronic information system that will power the Information Society of Toffler's, "Third Wave" is also a strong uniting force in bringing together and binding together the various parts of the food industry system. The emerging world-wide structure in the

food industry, as well as, forces of integration and concentration are tying the segments of the system closer together. The world-wide financial networks add more structure to the system. Of course the power of technological change can be more effectively harnessed within a strong system. Lastly, environmental pressure can better be handled within a systems context.

What are the Forces Resisting Total System Planning? The basis of resistance to total systems planning can be summed up in the human condition. Issues of a societal and political nature are important here. Finally, and maybe foremost here, is the issue of control. Who is in charge?

Bottom Line Even the most "die-hard" "muddler" would admit that development of the United States Food Industry over the next 25 years would be severely limited without some sort of systems planning. Conversely, the strongest supporter of system planning would admit that chances of getting an industry that is so diverse, complex and all encompassing to agree to total systems planning are slim and none; let alone not desirable.

So, an accommodation. Let's divide the planning into common and private issues. On common issues, such as information technology, product movement, food safety, environmental concerns, industry-wide planning would be appropriate and strongly supported. On private issues, such as company visions and objectives, organizations, profitability, internal efficiency, hands-off. These are private matters. The author's sense of the blend between common and private issues is that, over time, the area of common issues will broaden and area of private issues will become more narrow. As the segments of the food industry learn to work together more effectively, many of the secrets will disappear.

"E.C.R." is headed in this direction and should be actively encouraged. So, to all you "muddlers", happy muddling. And to you planners, happy planning. There is plenty of talent in the food industry to find the proper mix of both to move us successfully into the 21st century. We have but to use it.
