

GAO

Testimony

June 28, 1988

Opportunities to Improve U.S. Food/Agricultural
Exports Through Improved Marketing Techniques

A Statement for the Record by
John W. Harman, Associate Director
Resources, Community, and Economic Development
Division

Submitted to the
Subcommittee on Wheat, Soybeans, and Feed Grains
Committee on Agriculture
House of Representatives



137557

044148 / 137557

Mr. Chairman and Members of the Subcommittee:

We are pleased to submit this statement for your hearing record on "Selling U.S. Agriculture Worldwide." In response to your May 14, 1987 request, we have been identifying alternative public and private marketing mechanisms to enhance opportunities for the United States to improve its food and agricultural sales in foreign markets.¹

The statement describes how the use of marketing principles and techniques can play a role in expanding U.S. food and agricultural exports. Specifically, it discusses (1) the need for effective, long-term marketing strategies to assist U.S. food/agricultural exporters succeed in today's competitive world marketplace, (2) how a strategic marketing approach helps many foreign competitors succeed in world markets, (3) reasons why an explicit marketing strategy has not evolved in the United States, and (4) how strategic marketing could increase U.S. food and agricultural exports.

During this study, we spoke with about 65 individuals to (1) discuss international marketing issues for food and agricultural products and (2) identify opportunities for the United

¹Past GAO reports on the U.S. Department of Agriculture's Foreign Agricultural Service's programs (targeted export assistance, cooperator market development, and export guarantee) have identified the monitoring of program funds and objectives as means to improve program management.

States to position itself better in world markets through improved marketing techniques. These individuals, who represented various interests in food and agricultural export industries, included successful exporters, public and private sector export program officials, trade service company officials, bankers, academicians, and journalists. We also analyzed agricultural trade data, public and private export marketing guides, and journal articles and marketing principles.

We found that if U.S. food and agriculture exporters are to succeed in an increasingly competitive world agricultural market, greater adherence is needed to basic marketing principles such as designing positive product images, improving distribution systems, and developing competitive pricing and credit policies. Many of our foreign competitors are using such strategic marketing practices to target and capture market shares in food markets around the world as well as in the United States. However, U.S. food/agricultural policy has historically encouraged and continues to encourage production to satisfy domestic agricultural needs over marketing. The complex set of food agricultural programs along with agribusiness actions in the United States has not evolved into an explicit worldwide marketing strategy. The federal government and state governments have made some progress during the past few years in assisting private industry promote agricultural exports. But given the limited resources available, it is important for state, federal, and private officials to pool their resources in

developing new ideas and effectively applying strategic marketing principles in the world marketplace.

These findings and observations are discussed below in greater detail. Attachment I contains selected emerging marketing ideas offered by the agricultural marketing experts we interviewed. Attachments II and III, respectively, list individuals we contacted during this study and recent GAO reports on marketing issues, export programs, and agricultural trade issues.

**GLOBAL AGRICULTURAL COMPETITION REQUIRES U.S. EXPORTERS
TO DEVELOP EFFECTIVE LONG-TERM MARKETING STRATEGIES**

Considering new ideas to improve marketing at this particular time--when U.S. farm production is threatened by drought--may appear counterproductive. However, marketing in today's world is not an activity that can be turned on and off as weather conditions change. Marketing is concerned with satisfying customers' needs during both good and bad production years. The commitment to global customers must be looked on as, and indeed must be, a long-term commitment.

As we stated in our 1985 Agriculture Overview report,² U.S. food/agriculture of the 1980s is a part of a larger

²Agriculture Overview: U.S. Food/Agriculture in a Volatile World Market (GAO/RCED-86-3BR, Nov. 6, 1985).

food/agricultural system oriented toward complex marketing in a world economy. If U.S. food/agricultural industries are to maintain or increase market share, they must be able to provide competitively priced products in the form and of the quality demanded by different customers in both good and bad times. The days when the United States could rely on world markets as willing recipients of surplus products in high production years ended in the early 1980s when the European Community, Argentina, Canada, and other competitors became stronger factors in world agricultural markets. Success in world markets today requires marketing strategies built on a reputation as a reliable supplier of the products demanded by the different customers.

Basic Marketing Principles Apply

According to the U.S. Department of Agriculture's (USDA) Undersecretary for International Affairs and Commodity Programs, lower production costs provide the United States with a comparative advantage for many agricultural products. However, in today's competitive marketplace, cost advantage by itself will not guarantee sales.

U.S. suppliers must be flexible and responsive to rapidly changing user requirements and consumer preferences in foreign markets. These dictates of the marketplace apply as much to traditional U.S. exports of bulk agricultural commodities (grains,

oilseeds, and cotton) as to high-value products--products that have been processed to some degree before export, such as soybean meal or cattle hides, as well as certain unprocessed commodities like specialty crops, for example, dates or high-protein wheat. Comprehensive export marketing strategies may differ as a function of the product, but the same basic marketing principles apply. These would include:

- developing a long-term market development plan that identifies where the markets are, the competitive environment, and the potential for growth;
- designing positive product images around end-user requirements or around consumer preferences regarding style, brand name, quality, safety, and packaging;
- improving the ability of distribution systems to deliver products efficiently to market outlets. While U.S. exporters have access to a reliable, year-round delivery system, the system must be adjusted at times to meet individual customer shipping requirements;
- further positioning the products through competitive pricing and credit policies. A favorable credit package could help close a deal, particularly in developing

countries which often have the need but not the hard currency to purchase U.S. agricultural products; and

-- making customers aware of the products through promotional activities in targeted markets. Such activities include trade exhibits, in-store displays, and advertising.

STRATEGIC MARKETING APPROACH HELPS FOREIGN COMPETITORS SUCCEED

According to USDA's Deputy Assistant Secretary for Economics, when it comes to learning about marketing, our competitors are the source of many of the ideas. He said that U.S. agriculture is currently far better supplied with information on production techniques than on marketing techniques and lacks many of the marketing essentials. For example, he said that information on export financing methods, health and sanitary regulations in importing countries, and taste and preferences of foreign customers is frequently inadequate. He added that while representatives from country after country come to USDA looking for advice on improving agricultural production, far fewer ask for assistance or advice on marketing.

Many foreign competitors in food and agricultural industries have adopted marketing principles and strategies which have allowed them to enter and capture foreign market shares. Countries with well-designed food/agricultural marketing strategies include, among

others, traditional European Community agricultural producers such as France, West Germany, and the Netherlands and Australia and more recently Japan. For example, the Dutch developed high quality red, yellow, and black sweet peppers and found a niche in the U.S. gourmet pepper market. Australia has proven to be a tough competitor because of its aggressive marketing style. For example, Australia offers package deals that include milling equipment and services in conjunction with commodity sales. Japan has taken a chapter from its book on marketing high technology and is helping finance and target long-term development in specific food industries. The growth of Japanese food exports to the United States, for example, started with an ethnic, oriental-targeted market, but has now broadened to penetrate diverse consumer markets with such products as surimi (imitation seafood) and instant soups.³

New Zealand has taken a comprehensive strategic marketing approach to its food and agricultural sector. In 1984, the New Zealand Planning Council prepared a framework for a national marketing strategy for agricultural exports. According to the report,

"It will no longer be sufficient to pursue a strategy in which policies are aimed at maximizing production in the hope or expectation that the market will take care of

³In response to a request by the the Senate Agriculture Committee, we are currently reviewing foreign countries' market development activities.

itself. More and more, New Zealand's agricultural strategies will need to respond to developments in the market-place, looking for demand, price and competitive supply signals, from markets abroad, allowing them to filter back through the system to the point at which marketing, processing, production, investment and individual land use decisions are made."⁴

REASONS WHY AN EXPLICIT U.S. FOOD AND AGRICULTURAL MARKETING STRATEGY HAS NOT EVOLVED

There are at least four reasons why an explicit U.S. food and agricultural export marketing strategy has not evolved.

First, according to USDA's Economic Research Service, the U.S. export strategies for bulk agricultural commodities have historically been a part of an overall farm policy that has encouraged production over marketing. The complex set of U.S. food and agricultural programs were created in a climate where domestic agricultural needs and the development of export markets for surplus commodities dominated the debate.

Second, the United States remains the world's largest food market for high-value products, and many businesses have long believed that the domestic market is large enough to accept all products they can produce. Yet even the domestic market is becoming highly competitive. In fact, the United States has run a

⁴R. Woods, K. Graham, and P. Rankin, Towards a Strategy for New Zealand Agriculture, (New Zealand Planning Council: Wellington, New Zealand, 1984).

negative balance of trade in processed foods since 1983, reflecting the success other countries have had in targeting the U.S. market.

Third, according to an Office of Technology Assessment report on agricultural competitiveness,⁵ most domestic U.S. high-value product exporters lack the interest and/or the marketing acumen to aggressively profit from the strong growth in world high-value trade. The value of world trade in high-value products now exceeds world trade in lower value bulk agricultural commodities. According to the report, most domestic U.S. companies have not been able to compete successfully with foreign traders who have been marketing exports for a much longer period of time.

Fourth, according to the U.S. Department of Commerce, between 25,000 and 40,000 mostly small and mid-size companies have not attempted to market their products abroad, even though they manufacture products that would be competitive in price and quality. Among the reasons cited are that small and mid-size firms typically regard international trade as the exclusive market of large companies.

⁵Office of Technology Assessment, A Review of U.S. Competitiveness in Agricultural Trade--A Technical Memorandum, OTA-TM-TET-29 (Washington, D.C.: Governnmet Printing Office, Oct. 1986).

MORE EFFECTIVE STRATEGIC MARKETING COULD INCREASE

U.S. FOOD AND AGRICULTURAL EXPORTS

An expanded use of worldwide marketing strategies could increase export opportunities for U.S. food and agricultural companies by adapting products and services to worldwide customer needs and preferences. The following discusses how such strategies are being pursued by some food/agricultural exporting companies and by the federal and state governments.

Different Strategies Apply to Different Sized Firms

In response to heightened competition, marketing-oriented companies are supplementing the basic marketing principles with market strategies that consider where the individual company fits in respect to the competition. These strategies guide companies to "defend" their market shares, to "attack" and "flank" their competition, or to wage "guerrilla" tactics. Competition among the major companies in a given market is characterized by the defensive mode taken by the industry leader, and the offensive or attack mode taken by the major competitors. Flanking strategies are undertaken by companies that do not have the capability to successfully compete head to head with the market leaders. Flanking strategists fill a market need with a new or unique product, such as New Zealand's success in developing and marketing kiwi in the 1970s and new cuts of packaged lamb products in the 1980s, or the Iowa

exporter who successfully introduced a new corn hybrid into Asian markets.

The development and marketing of cranberry-based fruit juice beverages and red sweet peppers illustrate "guerrilla" (niche marketing) tactics at work in the domestic market. Ocean Spray Cranberries, Inc., captured a share of the domestic soft drink industry that was significant for the company but not large enough to threaten the major soft drink companies. Following the success of the Dutch, U.S.-based Sun World International, Inc., has successfully developed and marketed its own variety of sweet red pepper that is available domestically throughout the year. Companies using guerrilla tactics are generally smaller companies that have economies of scale for their products but do not have the capability to successfully compete with the market leaders.

The Dutch and Japanese examples noted earlier are examples of the success different sized firms can have by targeting specific niches even in the most competitive food market, the United States. Such Dutch and Japanese companies are willing to deal with foreign exchange fluctuations, learn to conduct business in the customer's language and cultural milieu, and deal with foreign systems that differ from their traditional marketing patterns, such as the U.S. distributor's role, inventory methods, product standards, shipping requirements, and payment policies.

Selling in a foreign country can help reduce risk by providing advance warning of consumer trends before products enter U.S. markets or by broadening a company's customer base, thereby providing a hedge against periods of low domestic activity. Nevertheless, the reluctance of most U.S. companies to compete in world markets suggests that most U.S. companies believe the overall risks to be greater than the rewards.

The Food Security Act of 1985 Placed a Greater Emphasis on Market Development

In recognition of the United States position in world agricultural markets, the Congress set a goal in the Food Security Act of 1985 (P.L. 99-198) to provide agricultural commodities and products for export at competitive prices, with full assurance of quality and reliability of supply. Since the act went beyond focusing on traditional production-focused programs, it was a step in the evolution of an explicit marketing strategy. The act extended funding for USDA's Foreign Agricultural Service's (FAS) export credit guarantee programs which facilitate private financing to foreign buyers by protecting exporters or their assignees against nonpayments; established FAS' Targeted Export Assistance Program which authorized the Secretary of Agriculture to make funds or commodities available to counter or offset the adverse effect of subsidies, import quotas or other unfair trade practices of foreign competitors; and remphasized the Cooperator Market Development

Program with which FAS involves private sector agricultural interest in its overseas market development activities.

The act also encouraged greater funding for promotion of value-added and processed products. In response, FAS established a High Value Products Division that is responsible for a variety of export promotion activities, services, and products of particular relevance to the branded food product company, such as electronic foreign trade leads, export market profile reports, and export product label clearance assistance.

These market development programs have taken the United States another step towards effectively competing in world food and agricultural markets. Additional steps that could be taken would focus more on a strategic marketing orientation that identifies food and fiber needs, produces appropriate products to meet those needs, and develops a comprehensive marketing program to boost exports.

Some States Have Been Developing

Food/Agricultural Export Strategies

The sharp decline in agricultural exports between 1981 and 1985 also focused attention on state programs that promote overseas sales. The state role is particularly important because the states have a direct link with private industry, particularly with the

small, export-minded companies that are too small to maintain their own export divisions, overseas offices, or market research departments.

State agricultural export promotion activities have had mixed results. Overseas state promotion offices, trade missions, and a host of other international activities were in some ways successful in both expanding business and increasing the awareness of the benefits of international trade. In some instances, however, such efforts led to confusion, particularly when states focused on promoting bulk commodities in the 1960s. For example, since number 2 yellow soybeans from Illinois look the same as number 2 yellow soybeans from Iowa, the result was a great deal of confusion abroad. Concerned by such occurrences, in 1968 FAS organized and funded four regional organizations and the National Association of State Departments of Agriculture so that more focus could be developed for state export promotion efforts. According to a 1986 National Agricultural Export Commission working paper, the four regional organizations serve a useful purpose in improving regional coordination, but some of the coordination function has been lost because the regional groups developed their own programs as separate entities, and in many cases the programs were not well coordinated with state international marketing efforts. The working paper called for a new look at federal/state cooperation in agricultural export promotion.

Most attention in state agricultural export programs is paid to demand development--expanding the sales of the state's existing products to world markets. For example, Kansas developed an annual marketing plan that follows the demand-creation model. The plan assesses growth in overseas market demand and matches the demand against products available in the state. Texas identified and captured new markets for Tex-Mex foods in England, West Germany, and Denmark.

The states of Wisconsin and Massachusetts go beyond identifying new market niches for existing products to include services. For example, a recent sale of Wisconsin dairy stock to Thailand included the export of dairy-herd-management services of a university specialist. Massachusetts apple exports to Barbados included a team of refrigeration experts to help the Barbados government revamp cold storage facilities.

A number of states follow a two-pronged approach that includes both the demand-creation model and a strategic marketing-oriented model.⁶ Under the marketing-oriented model, the states assess market niches and work backwards to modify existing products or develop new products tailored to the identified opportunities. Successful state marketing-oriented examples include the following:

⁶For additional information on state agricultural strategies, see M. Popovich, "State Strategies for Promoting Agricultural Exports" from The Role of State Government in Agriculture (Winrock International, Morrilton, Ark.: 1988).

- Virginia sales of center-cut white poplar lumber to the United Kingdom as a substitute for Indonesian ramin, a traditional European furniture-making wood that has been increasing in price due to production controls.

- Minnesota's sale to Japan of containerized rapeseed oil that meets a higher quality level than that required by USDA.

- Washington State's program that identified a 3-week window of opportunity (between the end of California production and the beginning of the Japanese crop) for high-quality, quickly transportable Washington asparagus in Japan.

- - - - -

In closing, recent actions taken by the federal government and by some states to further the use of agricultural marketing techniques have provided some assistance to U.S. agricultural exporters. Improved efforts along these lines could further help these exporters to succeed in an increasingly competitive world agricultural market. Given the limited resources available, it is important for state, federal, and private officials to pool their resources in developing new ideas and effectively applying strategic marketing principles in the world marketplace.

This statement completes our work in response to your May 14, 1987, request. We will be glad to further discuss food/agricultural marketing issues with you or your staff.

SELECTED MARKETING IDEAS TO IMPROVE
U.S. FOOD AND AGRICULTURAL EXPORTS

This attachment lists a range of selected marketing ideas that were suggested by individuals who were interviewed for this study. We divided these ideas into five broad categories: (1) market research and information, (2) trade financing, (3) marketing channels, (4) technical assistance and trade services, and (5) marketing skills and awareness. We have not evaluated the pros and cons of these ideas, most of which are in the brainstorming stage and need to be more fully developed and evaluated.

Market Research and Information

1. Federal export market research and information should be depicted as preliminary research. Government information can be helpful in framing areas of interest. The key for exporters is to use the government data as a preliminary step and to know how to build on the information with more specific market research.

2. The federal government should exercise its comparative advantage in collecting large volumes of information but should allow private vendors to distribute the information because they

can do it more efficiently. The United States should be facilitating a private vendor system for tapping European and other market data sources not available here.

3. A national marketing information institute could centralize all government information resources under one roof. It could serve as an educational function, where successful marketers can teach others about their successes. Part of the institute's mission should be to help exporters better understand the economic systems of trading partners so that U.S. companies can adjust accordingly. Domestic companies do not always understand that international trade does not always operate on the capitalistic principles used in the domestic market.

4. State governments could serve as information clearinghouses by collecting and transmitting general information about foreign markets, export assistance programs, and educational opportunities. Data originating with the U.S. Department of Commerce and USDA, for example, could be efficiently collected, screened, and transmitted by state governments to interested exporters.

Trade Finance

5. The federal government provides export guarantees through the Commodity Credit Corporation's Export Guarantee Program (referred to as GSM-102) and the Intermediate Export Credit Guarantee Program (referred to as GSM-103). The programs are intended to permit countries to buy U.S. agricultural commodities when guarantees are needed to get private financing. Such export financing should be developed as a competitive tool. Financing terms can be used to attract different customers for bulk commodities. Such differentiation provides a competitive edge for bulk commodities. In addition, availability of financing for high-value products makes transactions more appealing in an industry that often relies on cash.

6. Secondary financing market mechanisms--private companies that purchase and deal in outstanding loans--provide trade financing options for banks and exporters. Providing a secondary market for U.S. agricultural export credits would allow U.S. banks to be more competitive in trade financing. Greater flexibility in government export credit programs would enable commercial banks to offer more favorable trade financing to small- and medium-sized firms.

7. Other financing practices may further assist U.S. exporters. Confirming houses, which are financing institutions providing a secondary market for trade loans in England, are intermediaries that provide credit and a clearing facility for international transactions. Forfaitage (where an exporter sells title to its goods to a financing agent who then completes the transaction with the importer) and factoring (where intermediaries called factoring houses purchase export receivables for a discounted price) are other mechanisms that purchase and deal in loans from primary lending agencies.

8. Bilateral agreements and countertrade (such as barter) as alternative trading approaches deserve consideration in dealing with developing countries and other countries with foreign currency shortages. Recent trends indicate that world agricultural trade will witness continued usage of both bilateral agreements and countertrade as alternative means to stimulate exports.

9. Federal tax incentives and/or subsidized loans could encourage exporting and facilitate a long-term overseas presence. Competing exporting countries targeting the U.S. market provide reduced interest loans for exporting/marketing development.

Marketing Channels

10. Export programs should give more emphasis to marketing channels--components in the marketing system that facilitate the exchange between buyers and sellers. Export intermediaries, such as export management service companies, can service many businesses and develop the scale of operations needed to facilitate efficient sales. Financing intermediaries could facilitate exports by handling several trades from several companies in a single transaction.

11. U.S. businesses need a mechanism for exporting technology. The United States has long relied on exporting goods, but it is the world leader in technological innovation, and opportunities exist, such as joint ventures, for establishing trade links with this knowledge. Technology could precede product exports into developing country markets and serve as income generators that lead to later export relationships.

12. Marketing orders are an underdeveloped marketing tool that enables industry groups to work in concert to conduct common demand-enhancing export functions, such as market research, establishment of quality standards, and packaging requirements.

13. A central agency for international trade could coordinate national export programs and would be a visible symbol of the importance of international trade to the nation's economy. The current dispersion of export programs among several departments dilutes the effectiveness of export marketing efforts because international trade is not the primary mission of most departments. The federal government needs to offer exporters a cooperative package of technical assistance and trade services from several different agencies.

Technical Assistance and Trade Services

14. Several organizations, such as export management companies, business incubators, and world trade centers, are available to provide marketing assistance to exporters. Export management companies are underdeveloped as trade mechanisms that can help small businesses perform preliminary market research, develop market entry strategies, and offer entry into foreign markets. Export business incubators, linking businesses with the research facilities of universities, can develop international marketing skills. World trade centers, which are international associations of privately operated business promotion organizations, provide an international business network that channels information, research, and communication for its members.

15. States could play an important role in providing specific marketing assistance for exporters of high-value products. They could develop new markets for these products and provide technical services for product development and packaging, and they could also be a catalyst for forming joint ventures among exporters.

16. A corporation could serve as a technical service intermediary for service contract sales. Technical services, as well as products, are export items. Such a corporation would be a clearinghouse for technical assistance and trade services and could provide add-on technical services as an additional inducement for commodity and producer sales. These sales could include commercial as well as government-sponsored contracts. Qualified bidders would be suppliers that are stockholder members of the corporation.

Marketing Skills and Awareness

17. The U.S. government must develop a more cooperative relationship with business. Government's "hands-off" attitude regarding business promotion forces large businesses, in particular, to work outside normal government marketing channels in order to facilitate exports. A public commitment to the exporting

business community, with appropriate oversight, is needed to ensure a national reputation for quality and reliability.

18. The United States needs to orient land-grant universities away from production economics and towards marketing and demand-led economics. Land-grant schools have a role in research and development, but they have been placing too much attention on yields, which may not be in the long-term interests of producers that should be concentrating on quality and producing to meet other customer needs. If agriculture departments do not make the switch to increased marketing focus, the Congress should consider targeting some agricultural research to business school marketing departments.

19. U.S. exporters need to develop alternative trading practices for international trade. U.S. firms have become accustomed to dealing with a large domestic market, and they must learn that export trade takes a long-term marketing effort, strong language skills, and a well-based cultural orientation. Entrepreneurial principles used in the domestic market are not always acceptable in international markets. China, for instance, is suspicious of the profit motives of private companies and prefers to work through cooperatives or joint ventures. Bilateral trading agreements,

consistent with foreign policy objectives, might be one trading channel with other countries that want some public participation.

20. U.S. exporters must be sufficiently flexible to meet customer needs. For example, Denmark captured a large share of the Japanese pork market by cutting pork to Japanese specification while the U.S. pork producers have not adopted their cutting methods to meet Japanese customer preferences.

**INDIVIDUALS CONTACTED FOR STUDY OF ALTERNATIVE
AGRICULTURAL MARKETING MECHANISMS**

Richard Anderson, President
World Trade Center of Washington
Alexandria, Virginia

Roger Barr, Vice President
Rabobank Nederland
New York, New York

Robert Bergland
Executive Vice President and
General Manager
National Rural Electric
Cooperative Association
Washington, DC

Warren Bowen, Manager
International Marketing and
Administration
Ocean Spray Cranberries, Inc.
Plymouth, Massachusetts

Gordon Bremer, Principal
Arthur Young and Company
Washington, DC

Jose Catita, Director
International Division
Giant Food
Landover, Maryland

Lon Cesal
Agricultural Development Branch
Chief
Economic Research Service
U.S. Department of Agriculture
Washington, DC

Ralph Chew, President
Chew International Group
New York, New York

Terry Conway, President
Handy Soft Shell Crab and Mash
Ham Company
Salisbury, Maryland

William Deiss, President
Trident World Trade Corporation
Alexandria, Virginia

William Delphos, President
Venture Marketing
Washington, DC

Hannan Ezekiel
Food Aid Programs Coordinator
International Food Policy
Research Institute
Washington, DC

Jane Fisher
Director of Marketing
Dairy and Food Industry
Supply Association
Rockville, Maryland

Richard Gady
Special Assistant to the
Chairman,
CONAGRA
Omaha, Nebraska

Caroline Garber, Policy Analyst
Wisconsin Department of
Development
Racine, Wisconsin

Richard Gilmore, President
GIC Agricultural Group
Washington, D.C.

Ray Goldberg
Professor of Agribusiness
Harvard University
Cambridge, Massachusetts

Robert Gomperts, Director
Division of Markets
Virginia Department of
Agriculture
Richmond, Virginia

ATTACHMENT II

J.B. Grant, Executive Director
National Association of State
Departments of Agriculture
Washington, DC

Charles Hallock, Vice President
Rabobank Nederland
New York, New York

Craig Hammit, Vice President
Chase Manhattan Bank
New York, New York

Timothy Hammonds
Senior Vice President
Food Marketing Institute
Washington, DC

Michelle Helgen, Vice President
Small Business Development
Control Data Corporation
Minneapolis, Minnesota

Ken Hoffmann
Chief Executive Officer
AHP Systems (NRECA subsidiary)
Washington, DC

Stewart Kohl
Senior Vice President
National Cooperative Business
Center
Washington, DC

Philip Kotler
Professor of Marketing
Northwestern University
Evanston, Illinois

Myron Laserson, Vice President
Continental Grain
New York, New York

Cheryl Leonhardt
Executive Director
International Business Center
Boston, Massachusetts

ATTACHMENT II

Philip Letarte
Director Agricultural Marketing
and Information Service
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, DC

Martin Lowery
Manager Consulting and
Training
National Rural Electric
Cooperative Association
Washington, DC

William Martindale, Chairman
MARTRADE
Newport Beach, California

Leo Mayer
Assistant Secretary for
Economics
U. S. Department of Agriculture
Washington, DC

Martha McCabe
Assistant Director
Mid-America World Trade Center
Wichita, Kansas

Jimmy Minyard
Former Administrator
Foreign Agricultural Service
Former Director
Commission on Agricultural
Trade and Export Policy
Clifton, Virginia

Grant Moffett, Former Director
Division of Markets
Virginia Department of
Agriculture
Richmond, Virginia

Michael Moran
Director Barbados Office
Institute for International
Cooperation in Agriculture
Washington, DC

J. Kent Morrison, Professor
University of Utah
Salt Lake City, Utah

Richard Nolan
Executive Director
Minnesota World Trade Center
Minneapolis, Minnesota

William E. Nothdurft
State Policy Consultant
Bethesda, Maryland

Irv Omtvedt, Vice Chancellor
Institute for Agriculture and
Natural Resources
University of Nebraska
Lincoln, Nebraska

Turner Oyloe, Executive Director
Walnut Marketing Board
Sacramento, California

Bruce Paschal, Consultant
Sun World International, Inc.
Coachella, California

Richard Passig, Director
Marketing Programs Division
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, DC

Allen Paul
Former Executive Director
Agriculture Council of America
Alexandria, Virginia

R. Stephen Perkins
International Trade Specialist
Virginia Department of
Agriculture
Richmond, Virginia

Leo Polopolus, Professor
University of Florida
Gainesville, Florida

Laurie Pondfield, Loan Officer
Export-Import Bank of the
United States
Washington, D.C.

George Pope
Assistant General Sales
Manager and Assistant
Administrator
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, DC

Mark Popovich
Senior Policy Analyst for
Natural Resources
Council of State Policy
and Planning Agencies
Washington, D.C.

Gordon Rausser, Chairman
Giannini Foundation
Professor and Chairman
Department of Agricultural and
Resource Economics
University of California
Berkeley, California

Kerry Reynolds, Director
Program Development Division
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, DC

James Rinella, President
Sun World International, Inc.
Coachella, California

Eric Rosenberger
Fudan Foundation
Washington, DC

Theresa Rosenberger
Fudan Foundation
Washington, DC

ATTACHMENT II

ATTACHMENT II

George E. Rossmiller, Director
Resources for the
Future/National
Center for Food and
Agricultural Policy
Washington, DC

Michael C. Rubino
Traverse Group, Inc.
Bethesda, Maryland

Michael Runde, Vice President
World Trade Center of
Washington
Alexandria, Virginia

Karl Schlunk, President
Teopfer International
New York, New York

Ed Schuh, Dean
Humphrey Institute of Public
Affairs
University of Minnesota
Minneapolis, Minnesota

August Schumacher
Commissioner of Agriculture
State of Massachusetts
Boston, Massachusetts

Morton Sosland, Publisher
Sosland Publications
St. Louis, Missouri

Leslie Stroh, Publisher
Exporter Magazine
New York, New York

David Swanson, President and CEO
Central Soya
Fort Wayne, Indiana

Audrey Talley
International Marketing
Specialist and Director of
Export Product Review
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, DC

Peter Thomas
Executive Consultant
Hay Group
Washington, DC

Robert Thompson, Dean
School of Agriculture
Purdue University
Lafayette, Indiana

Glen Vollmar, Dean
International Programs
Institute of Agriculture and
Natural Resources
University of Nebraska-Lincoln
Lincoln, Nebraska

RECENT GAO REPORTS ON MARKETING
ISSUES AND EXPORT PROGRAMS

MARKETING ISSUES

Issues Related to Imports of Sugar-Containing Products (GAO/RCED-88-146, June 22, 1988).

California Dairy--Production, Sales, and Product Disposition (GAO/RCED-88-180FS, June 15, 1988).

Causes and Impacts of Increased Fruit and Vegetable Imports (GAO/RCED-88-149BR, May 10, 1988).

Frozen Pizza Cheese--Representative of Broader Food Labeling Issues (GAO/RCED-88-70, Mar. 31, 1988).

Farmers' Marketing Practices and Programs to Teach Alternative Practices (GAO/RCED-88-78BR, Mar. 25, 1988).

Milk Marketing Orders--Options for Change (GAO/RCED-88-9, Mar 21, 1988).

Commodity Futures Trading--Purpose, Use, Impact, and Regulation of Cattle Futures Markets (GAO/RCED-88-30, Nov. 10, 1987).

Imported Meat and Livestock--Chemical Residue Detection and the Issue of Labeling (GAO/RCED-87-142, Sept. 30, 1987).

Trends in Imports of Fruits, Vegetables, and Other Agricultural Products (GAO/RCED-87-177FS, Sept. 29, 1987).

Agricultural Competitiveness--An Overview of the Challenge to Enhance Exports (GAO/RCED-87-100, May 7, 1987).

Seafood Marketing--Opportunities to Improve the U.S. Position (GAO/RCED-87-11BR, Oct. 22, 1986).

Factors Affecting Competitiveness in World Markets (GAO/RCED-87-35BR, Oct. 9, 1986).

Agriculture Overview--U.S. Food/Agriculture in a Volatile World Economy (GAO/RCED-86-3BR, Nov. 6, 1985).

The Role of Marketing Orders in Establishing and Maintaining Orderly Marketing Conditions (GAO/RCED-85-87, July 31, 1985).

EXPORT PROGRAMS AND AGRICULTURAL TRADE ISSUES

Commodity Credit Corporation's Credit Guarantee Programs
(GAO/NSIAD-88-194, June 10, 1988).

Review of Targeted Export Assistance Program (GAO/NSIAD-88-183, May 24, 1988).

Initial Phase of the Uruguay Round (GAO/NSIAD-88-144BR, May 5, 1988).

International Trade Commission's Agricultural Unfair Trade Investigations (GAO/NSIAD-88-58BR, Dec. 30, 1987).

FAS Management of Livestock Cooperator Program (GAO/NSIAD-88-24, Oct. 26, 1987).

Commodity Credit Corporation's Refunds of Export Guarantee Fees
(GAO/NSIAD-87-185, Aug. 19, 1987).

Implementation of 1985 Food Security Act Barter Provisions
(GAO/NSIAD-87-181BR, June 30, 1987).

Symposium on the Causes of the U.S. Trade Deficit (GAO/NSIAD-87-135S, May 15, 1987).

The U.S. Trade Deficit: Causes and Policy Options for Solutions
(GAO/NSIAD-87-135, Apr. 28, 1987).

Alternative Trading Practices for International Grain Trade
(GAO/NSIAD-87-90BR, Mar. 17, 1987).

Synopsis of Recent GAO Reports on Trade Issues (GAO/NSIAD-87-103BR, Mar. 17, 1987).

Implementation of the Agricultural Export Enhancement Program
(GAO/NSIAD-87-74BR, Mar. 17, 1987).

Review of Effectiveness of FAS Cooperator Market Development Program (GAO/NSIAD-87-89, Mar. 17, 1987).

Current Issues in U.S. Participation in the Multilateral Trading System (GAO/NSIAD-85-118, Sept. 23, 1985).

(097739)