Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

Food and Beverage Industry in the Southwest US:
Identifying Opportunities for Canadian Exporters

January 2006

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A. Executive Summary

The Southwest region encapsulates many of the overall trends seen across the US. At the same time, this region has many distinct characteristics that make it attractive yet challenging to the Canadian exporter. With above average population growth, and high levels of spending in the food category – this region features an attractive consumer base. Likewise, this consumer base has varied tastes and preferences that present numerous possibilities and opportunities to food exporters.

This report is intended to provide Canadian exporters with an overview of the food and beverage industry in the Southwest United States, a region comprised of Texas, New Mexico, Oklahoma, Kansas, Arkansas and Louisiana. It will touch on issues pertaining to the specific region, as well as industry issues that apply to the US as a whole. This report carries the reader through various important stages of export preparation, it links the reader to various key contacts within the region and ideally it informs the reader of important issues that could affect their approach to this particular market.

B. The Structure of the Food and Beverage Industry in the Southwest United States

1. Introduction

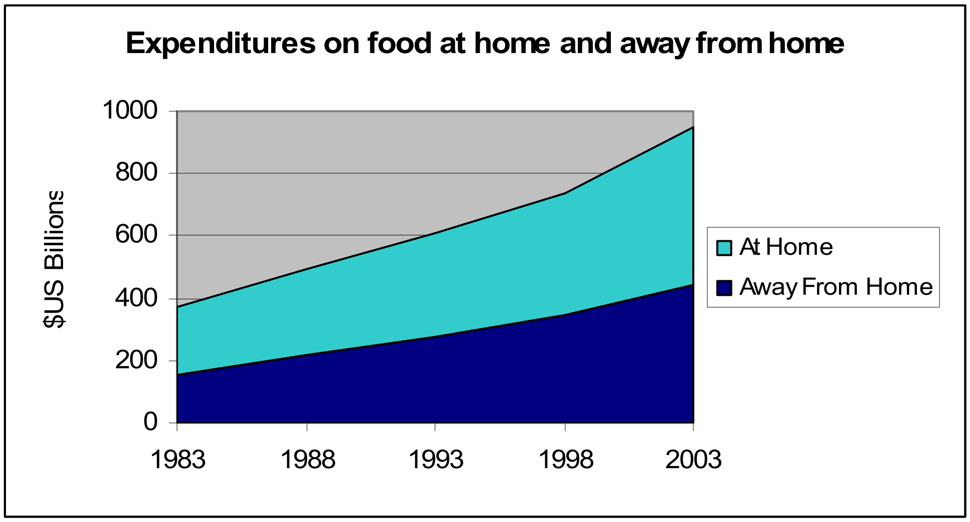
Food consumption patterns are linked closely to population growth patterns. As United States population growth rates level off over the next few years and these constant rates extend into coming decades, the food industry will have to adopt sustainable practices to prosper within the confines of this particular pattern.

While the market for food products will only grow incrementally in terms of consumer numbers, it will grow more complex, along with the population. The evolution of more sharply defined groups of consumers will offer growth opportunities to those firms that understand these evolving markets and can supply their needs. It is also important to recognize that although the overall consumer base will rise incrementally, there are sub-groups that will grow substantially. By sub-categories, we refer to particular age groups that will dominate the market, as well as particular ethnic populations that will grow beyond the average population rates. These sub-groups will feature unique needs, tastes and traits; particularities that if catered to by food producers can lead to prosperous niche market domination.

2. Market Characteristics in the US and the Southwest

The US food industry is generally tied closely to the overall economic health of the country. During troubled economic times spending on meals away from home declines rapidly, while overall spending on food is also tightened. Also, component costs affect the industry as well. The more expensive it is for a manufacturer to create their products through the combination of certain components, the more expensive the end product is to the end user.

But regardless of year to year trends or fluctuations hinging on the current economic state of the country, expenditure on food has been following an upward trend for decades. This is an obvious pattern that results primarily from increases in population; the more people overall – the more overall expenditure on food. Close to US$950 billion dollars worth of food was supplied by the food industry in 2003, and foodservice facilities providing the consumer with food away from home options accounted for US$445 billion of this total.



Source: ERS Economic Research Service USDA – Food Market Structures

Food-at-home: Food-at-home prices increased by approximately 3.8% in 2004.[1] This was the highest increase experience since 1990. The overall effect of a more competitive retail environment has managed to keep food prices relatively stable. Likewise, with trends emerging surrounding consumer knowledge about food, attention to health issues and desire for exotic tastes – the decision to prepare foods at home has become more prevalent. Consumers are interested in having control over what they consume and how it is prepared.

Food away from home: Commercial food service providers account for nearly 80% of away-from-home expenditures. At a time when most lifestyles are more hectic and more dual income or single person households exist – demand for food away from home will increase as a result of the demand for convenience and time saving food option.

American retail grocery store sales were approximately US$650 billion in 2004; a 2% increase over 2003; while retail food sales reached a total of US$425 billion in 2004. Overall retail grocery sales are increasing as a result of numerous factors including increased product assortment as well as product offerings that extend beyond food items and food preparations.

The Southwest food service and food retail market has a consumer base of nearly 38 million people or 13% of the entire US population. This region holds nearly 4,200 supermarkets alone, with a total market value of nearly US$58 billion in 2004; this represents 9% of the entire country's retail grocery sales. These markets will continue to expand vigorously with both Texas and New Mexico recording percent changes in population that extend beyond the national rate of 5.3% between 2000 and 2005; in fact these particular States are rated amongst the top ten fastest-growing States according to this characteristic.[2]

[1] Ibid

[2] Population Projections US Census Bureau Issued May 1997

3. Consumer Expenditures

The major components of spending for the average American consumer can be categorized as follows: spending on food, spending on housing, spending on entertainment, and spending on insurance and pensions. These categories combined account for approximately 90% of all lifestyle expenditures. Between 2002 and 2003 there were no drastic changes in the amount of money allocated to each of these main categories. Generally speaking, expenditure shares are relatively stable from year to year, and this makes the distribution more useful for identifying long term spending trends[3].

There was a mere 0.7% decline in spending on food in 2003. This overall decline was a result of a slight increase in spending on food at home offset by a slightly larger decrease in spending on food away from home[4]. This was the first time in over 10 years that spending in the away from home category had decreased. Although the decline was relatively small it was likely a result of a slightly unsettled economy, during such times consumers are less likely to spend money on food away from home, and more inclined to prepare meals at home.

More specifically, this increase in spending on food at home was a result of the following upward and downward shifts. The purchase of cereal and bakery products decreased by 1.8%, the purchase of fruits and vegetables decreased by 3.1%; while the purchase of meat, poultry, fish and eggs increased by 3.4%, and finally - 3% of "other" food at home (including sugar, sweets, fats and oils and non-alcoholic beverages) made an increase[5].

Average annual expenditures and spending characteristics vary according to regions in the United States. Although overall trends in food spending vary slightly between average consumers, greater fluctuations can be seen in larger pockets of consumers that carry similar characteristics – a tendency that can be illustrated when looking at expenditures in particular US regions.

Region of Residence: average annual expenditures and characteristics

Item	All consumer units	Northeast	Midwest	South	West
Average overall annual expenditures	**$40,817**	**$42,162**	**$40,280**	**$37,625**	**$45,381**
Food Total	**5,430**	**5,730**	**5,088**	**4,960**	**5,876**
Food at home total	**3,129**	**3,306**	**2,904**	**2,996**	**3,428**
Cereals and bakery products	442	485	411	413	482
Meats, poultry, fish and eggs	825	889	734	835	849
Dairy products	328	353	323	298	359
Fruits and	535	586	472	489	633

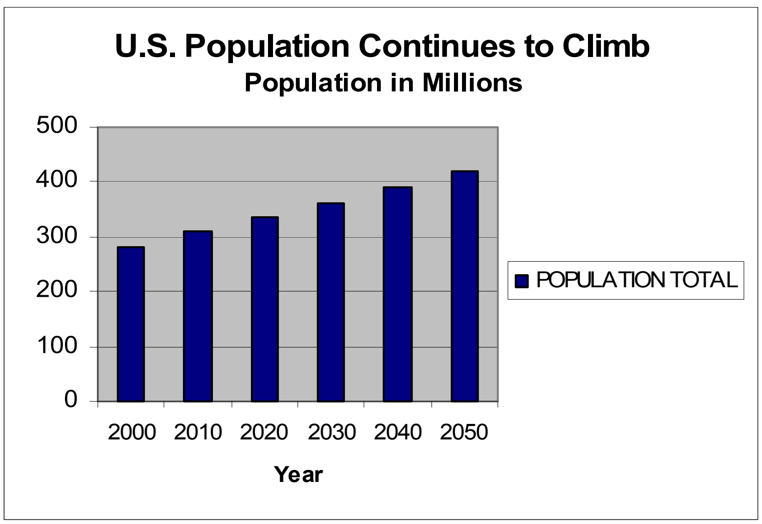
[3] Consumer Expenditures in 2003 US Department of Labor, US Department of Labor Statistics June 2005
[4] Ibid
[5] Ibid

vegetables					
Other food at home	999	994	962	961	1,104
Food away from home total	**2,211**	**2,424**	**2,184**	**1,964**	**2,449**

Source: Consumer Expenditures in 2003 US Department of Labor, US Department of Labor Statistics June 2005

4. Consumer Market

While large firms consolidate and strengthen their hold on the market by efficient production methods increasing volumes produced, consumer markets become increasingly diverse and segmented into smaller niche markets.



Source: US Census Bureau: Projected Population of the United States, by Age and Sex: 2000 to 2050

Niche markets seem to grow at a more rapid pace. It is these markets that capitalize on trends that evolve within the market, and these markets that have the greatest potential for fast paced expansion. For example, the US organic food market achieved sales of over US$15 billion in 2004, and sales are predicted to grow 110% to reach US$32 million by 2010. Organic dairy, breads, grains and beverages are expected to double in sales by 2010, while fruits and vegetables are expected to triple in demand. Canadian exporters can capitalize on these rapidly expanding focused markets, and benefit from existing consumer perceptions of Canada as a clean, pure and unspoiled source for food.

Per capita income in this region is in the bottom 50% of the US states. However, from a low of US$24,000 to a high of US$29,000 this region boasts relatively healthy income levels and a consumer base that spends higher than average amounts of its disposable income on food purchases.

With the fast paced growth in Texas and New Mexico, the composition of the South Central population is changing rapidly. Texas and New Mexico are becoming core areas for Hispanics and people of Latino origin. By 2020, Hispanics are anticipated to make up 16% of the US population. Texas is highly influenced by the Mexican economy which is gaining strength, as seen in El Paso where Hispanic persons make up 76% of the population. Referred to by Business Week as America's "Bebé Boom" - the Hispanic community is quickly replacing the original baby boomers.

The changing demographics due to the increased immigrant population, particularly Hispanics in the Texas and New Mexico region, will undoubtedly increase the consumption of Hispanic and Latino foods. Consumption trends such as health concerns and price consciousness will drive demand for healthy, natural, organic and low carbohydrate diet foods, as well as private labels.

Increased purchasing power for Hispanics means that the move from neighbourhood food retail establishments to full-service supermarkets will continue. A restructuring of supermarket chains located within the Hispanic community is taking place as there is an in increase in bilingual cashiers and stockers, in addition to regional and ethnic products. Retailers have also made changes to their campaigns, offering advertising and in-store service in their additional languages that speak to the ethnic consumer. Hispanics spend 16% of their income on food, which is 3% higher than non-Hispanic families.

Apart from growth in the Hispanic population, this region is experiencing very strong growth in its Asian population. By 2020, Asian Americans will make up an estimated 7% of the US population. This is the fastest growing ethnic group in the US and the South Central Region. Texas is predicted to have more than one million Asian persons by 2020, an increase of more than 30%. These concentrations of cultures provide opportunities to cater to these market segments through diversifying product lines in the ethnic food market.

2004 State Populations and Demographics

State/Region	**Population**	**Hispanic**	**Asian**	**African American**
Arkansas	2,752,629	3.6%	0.9%	15.0%
Kansas	2,735,502	6.6%	2.6%	5.4%
Louisiana	4,515,770	2.4%	1.5%	31.0%
New Mexico	1,903,289	42.4%	1.2%	8.3%
Oklahoma	3,523,553	5.5%	1.6%	7.3%
Texas	22,490,022	34.4%	3.0%	10.6%
Southwest US	37,920,765	24.0%	2.4%	12.2%
United States	294,393,924	13.6%	4.1%	12.6%
Arkansas	2,752,629	3.6%	0.9%	15.0%

In today's ethnically diverse Southeast region, there is no longer a homogeneous shopper to target. Consumers must now be categorized and marketed to according to a wide array of demographics and psychographics.

American consumers average eight shopping trips a month and spend about US$93 on weekly groceries; US$70 of which is spent at their primary grocery store. Although low prices still greatly affect consumer purchases, shoppers rate store cleanliness as the most important factor in selecting a primary shopping location, even above store proximity. Store cleanliness is followed by high quality produce, high quality meat, price, service, and finally store location.

Recent studies suggest that with as many as two thirds of Americans being overweight and 55% trying to maintain a healthy diet, the trend toward healthier eating has increased in popularity. Seventy-three per cent of Americans now purchase more nutritious foods and beverages than in the past. Furthermore, 66% of consumers look for food products made with whole, unrefined grains; followed by those containing vitamins and minerals (59%); goods that are reduced or low in fat (65%), calories (54%), and carbohydrates (42%); and sugar free (49%) products. Natural and organic foods, and products that are high in fibre or free of trans fats are also extremely popular.

Consumers also want a variety of quality, quick and convenient portable options. With 75% of dinners still eaten at home, and 44% of which are prepared in 30 minutes or less, there is great demand for prepared foods as consumers turn to supermarkets and restaurant takeout counters for meal solutions. Food companies are eagerly responding with new assortments of convenience products, especially ready-to-eat and ready-to–cook meals. Supermarkets are also following suit by making ready entrées in-store with fresh ingredients. Supermarkets captured 27% of consumer takeout meal purchases in 2004, while fast food outlets accounted for 35%, and restaurants acquired 18% of this market.

5. Consumer Trends and Developments

In the Southwest US consumer preferences are more complex and in some ways contradictory. Some consumers demand healthy and nutritious foods while others buy increased amounts of snack foods. Some consumers prefer foods with minimal processing and sterile packaging, while others require fully biodegradable cartons. Some consumers are buying more fresh produce, while in contrast others are in search of convenient foods requiring little to no preparation. Clearly this industry and the consumers it caters to are highly diverse.

Some key trends and developments surfacing within the US food market are detailed below:

- An aging US population has increased demand for functional foods containing identifiable health benefits. By 2050 nearly 43% of the population will be above the age of 45, of which 20% will be 65 years of age or older.[6]
- Demand for quick-preparation items have increased as a result of hectic lifestyles and the prevalence of dual income households.
- Americans are food savvy. Their increased awareness on the subject has induced a desire for increasingly exotic tastes and premium food items.
- With increased access to health information via all forms of media, consumers are increasingly aware of the health issues associated with diet.
- Manufacturers are aware of the importance in targeting niche groups. They now understand that in order to attract a specific consumers attention, they have to alter their product in specific ways – an increase in costs, but an equally important increase in market potential. Colours, tastes, packaging and special offers all play a role in the niche market targeting. For example; bright colours, games and characters appeal to children, while bilingual packaging and ethnic inspired flavours can appeal to the ethnic consumer.

[6] US Census Bureau: Projected Population of the United States, by Age and Sex: 2000 to 2050

- Product differentiation is an ongoing challenge for manufacturers; they are constantly looking for new and innovation ways for their product to stand out on shelves and in the minds of the consumer. With today's consumer demands packaging has to be multi-functional. It has to be appealing aesthetically as well as functionality.
- With an increase in food scares including BSE and salmonella poisoning, consumers are placing an increased importance on food safety and traceability issues.
- Many consumers, specifically the younger generation consumers are concerned with the ethical and moral responsibility of the companies that supply them their food.

Health and Wellness Trends

With two-thirds of the US population considered overweight, the obsession with diet and health food rages on. Customers are becoming highly conscientious of their food choices. Manufacturers and retailers have begun to address these concerns by making changes to their product lines. Product reformulations, reduced portion sizes, sugar and fat content are a few of the ways these companies are responding to health issues. Many food labels now carry symbols to display the health and/or safety benefits contained in the product.

Meal replacements, nutraceuticals and organics are gaining ground due to their ability to fill gaps in the eating habits of consumers. No preservatives, fortification and no trans fats are terms that can be found on food packaging and advertising. Over half of Americans have tried organic foods and as much as 10% use organic products regularly.

The trend toward healthy eating in the United States is significant, but it fails to offset the traditional perceived value and popularity of products promoted with larger product packaging and larger product portions. As much as healthy eating is a trend amongst the average consumer, the effort to eat healthier could easily be described as casual, with healthy eating choices being incorporated into less than healthy diets.

Value Shopping Trends

Economic instability and slow job growth has prompted US consumers to be more price conscious in their food purchases. This has lead to the growth in price-impact grocery stores where large quantities and less selection lead to more competitive prices. This no frills model minimizes customized packaging, and allows for self-checkout. Roughly two-thirds of consumers use price as a determining factor in purchasing food items. Several factors are propelling this trend including:

- "Fixed" household costs have increased and more middle to lower-income households are forced to spend less in discretionary areas
- Slowdown in job growth
- Price spikes in basic needs - gas, eggs & bacon, milk and meat and poultry

One of the effects of the more price conscious attitude has been growth of private label food products. Once perceived as a lower class product, it is now seen as a close equivalent to many brand name products. Many grocery stores are developing their own product lines in order to offer lower prices to consumers while increasing profit margins. Consequently, the private label market has grown rapidly with an increase of 99% from 2000 to 2004.

Alternative Store Format Trends

The distinction between the different formats of supermarkets is blurring as chains continue to reinvent their image. This is in an attempt to provide the convenience of an "all-in-one" shopping experience and to compete with alternative format stores which are cutting away at the already mature market. Super-centers are predicted to increase their market share by a substantial amount as other categories slim down through increased competition and consolidation.

Alternative formats such as the everyday-gourmet supermarket, the healthy-organic shop, and the dollar store are all markets that are booming rapidly. Consolidated grocers are noticing this trend and are acquiring food chains that meet the needs of these specific groups or dedicating aisles to these formats inside their existing stores.

The everyday-gourmet supermarket niche follows a general format. A third of store space is often dedicated to gourmet take-out and semi-prepared meals, while the rest of the store resembles a regular supermarket with familiar brands and specialty items. Some stores have large indoor and outdoor dining areas, coffee shops, cooking classes and culinary shops giving consumers a relaxing, welcoming and exceptional shopping experience.

Whole Foods Market, a Texas based company, is the world's largest natural and organic food retailer. The blend of products that appeal to wellness and gourmet tastes has resulted in tremendous growth in recent years. Consumers, while price conscious, are highly concerned about having healthy choices.

Added Value Service Trends

From gasoline pumps to drive through windows, chains are experimenting with additional services in order to enhance the customer experience. Clearly, this trend is paying off as supermarkets with a pharmacy have seen increased store traffic. Sales of health and beauty care products rose 15% to 20% in the first year after retailers made these changes. Prescriptions sales in supermarket drugstores reached US$25 billion in 2003. As the rapidly growing 50-plus age demographic continues to increase, the number of stores combining food and other services is bound to expand. By 2007, food and drug combination stores are expected to account for 15% of the grocery industry's market share.

Beyond added services, chains are looking at their own capacity to produce private labels. Goods are often produced by manufacturers under contract to a retailer, which distributes them exclusively under their own "house brands." Many opportunities exist for Canadian exporters looking to enter the private label sector.

Packaged Food Trends

Retail sales of packaged foods exceeded US$290 billion in 2004 and by 2009 total sales of packaged foods are estimated to grow 12%. Since 2000, several products within this sector were strong performers. Leading the way, total sales of meal replacements increased 53% from 2000 to 2004. Snack bars also sold well with a 51% increase in the same period, followed by chilled processed foods (26%), frozen processed foods (19%), sweet and savoury snacks (18%), spreads (18%), baby food (17%), and noodles (17%). The snack bar category includes energy bars and breakfast supplement bars.

Consumers continue to spend on packaged foods, despite rising prices, as long as their needs for convenience, portability, nutrition, and flavour are being met. These trends have driven sales of frozen and chilled foods, meal replacements, and private label products. Meal replacement products are projected to lead packaged food sales in 2009 with a 64% increase over 2004 sales. Other projected increases by 2009 include chilled processed food (28%), snack bars (27%), sweet and savoury snacks (20%), noodles (17%), spreads (14%), baby food (13%), and frozen processed food (13%).

Private Label Trends

Private label packaged foods are on the rise as consumers begin to view these products as possessing brand name quality, nutritious selections, and competitive prices. Many of these private label lines include frozen ready meals and organic and ethnic products both inline with today's trends. Sales of private label foods reached US$50 billion in 2004. This segment rose 2% from 2003 to 2004.

Increased customer loyalty, improved store image, increased sales margins of 35% to 40%, and lower prices for customers are only some of the many positive results of selling private label brands. Four important reasons for the growth of the private label segment are an expansion in the number of products offered, an increase in quality, differentiation from other brands, and an overall change in consumer perception about these products. Top selling products in the private label segment are frozen processed food and meal replacements.

Frozen Food Trends

Frozen processed foods made up 10% of the packaged goods segment in 2004. With sales projected to increase an additional 13% by 2009, to US$30 billion. Even more substantial is the expected rise in chilled processed food sales, growing approximately 28% by 2009. Ethnic flavours, private label line expansion, and greater choice of portion size will draw more consumers to chilled foods. By 2009, frozen pizza sales are estimated to increase 21% over 2004 sales. Chilled ready meal sales are also expected to see a large increase, growing 16% from 2004 to 2009.

Meal Replacement Trends

In 2004, total sales for the meal replacement sector exceeded US$3.5 billion and are expected to surpass US$6 billion by 2009. This category now includes snack bars, energy bars and drinks, breakfast replacements, diet-reduction products and nutritional products. The increase in demand for nutritional products could be the result of an increase in the number of persons over age 65. It may also be attributed to the general population's change in perception toward these foods, from convalescence products for the elderly to nutritional products for any age.

C. Overall Industry Outlook

Over the 2004-2005 period it has been observed that although overall price inflation dropped, an increase in energy and overall operating costs meant the Consumer Price Index for all foods rose by approximately 3%.[7] When the components necessary to create a food product increase, this increase is passed on to the consumer in the form of higher prices.

2004 brought with it many challenges within the food and beverage industry. Trade disturbances surrounding issues such as Bovine Spongiform Encephalopathy (BSE) in both the US and Canada, increases in the US price of milk and weather connected impacts on the supply of produce distressed the food system. These challenges along with a slowing or unsteady US economy and an ongoing climb in energy prices meant that an overall increase in the price for food was inevitable. Despite these challenges and the effects they brought to the retail market, this inevitability was stunted by the ongoing fierce competition between retailers. The competitive nature of the food and beverage industry worked in favor of the consumer and kept food prices rather stable despite an unsound year. Market saturation works in favor of the consumer in many ways, as companies compete to increase their products visibility and sales rate, they often look to price drops to spur these activities.

The Food Retail Industry Market Sectors (2002-2003)			
US$ million	**2002 ($)**	**2003 ($)**	**% of industry (based on 2003 numbers)**
Supermarkets	384 844	399 907	57
Convenience stores	85 702	82 924	12
Mass merchandisers	57 205	62 008	9
Warehouse clubs	45 694	50 356	7
Alcoholic beverage specialists	31 324	31 919	4.5
Tobacco specialists	19 154	20 993	3
Vending	17 703	18 249	2.5
Other food specialists	16 500	16 549	2
Other retail outlets	21 189	22 178	3

Source: Euromonitor

1. 2004 Industry Overview - Retail

US retail grocery store sales were approximately US$650 billion in 2004, a healthy 2% increase over 2003. Grocery stores in the retail grocery market include supermarkets, convenience stores, dollar stores, warehouse/clubs, and specialty food retailers. Regardless of the increased competition, these retailers continue to find new ways to improve their operations and increase their share of the food retail market.

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[7] Economic Research Service – United States Department of Agriculture: Food CPI,3 prices, and expenditures: outlook for food prices in 2005

This diverse but fragmented sector may soon become a trend of the past as national and regional chains continue to consolidate in order to achieve economies of scale and increase their market share. In 2003, nearly 66% of the nation's supermarkets were affiliated with a chain, while the remaining 34% operated independently.

The convenience of both a discount store and a supermarket/drugstore format is highly attractive to today's consumers. The latest trend, called super-centers, can be described as a combination supermarket and discount store, with up to 40% of space dedicated to grocery sales. This new category of grocery store has brought about changes in the way market shares are calculated. Most of the recent sales increases can be attributed to industry changes, as stores such as Wal-Mart increase commitment to grocery related items in their super-centers.

Wal-Mart is one of the largest threats to traditional independent grocery retailers and currently operates 1,761 super-centers, 86 Neighborhood Markets, and 552 Sam's Clubs in the US. Wal-Mart's annual growth rate of 18% is largely attributed to its gains in the supermarket sector. In 2005, Wal-Mart anticipates opening approximately 300 new locations in the US.

Supermarkets

This is the largest segment of the retail sector. Supermarkets are dominated by chains. Despite success and growth this segment is under threat from discount, warehouse and club stores.

- Supermarkets dominate the US retail grocery sector with sales increasing 11% since 2000. In 2004, sales were more than US$355 billion, a 55% market share.
- Supermarkets typically have 25% gross margins, making it harder to compete with warehouse/clubs and dollar stores.
- Chain supermarkets operating within the annual sales range of the US$12-20 million bracket are most successful by contributing 19% of total supermarket shares.
- Chain supermarkets dominate 83% of total retail grocery sales while independent groceries account for 17%.

Convenience Stores

Typically staple items or on-the-go type goods, these stores continue to draw a majority of their sales from tobacco and alcohol sales. Grocery type products are an increasingly small percentage of total sales, while prepared take away type foods/meals are increasingly large.

- With more than 130,000 convenience stores across the country, in-store sales (not including gas) reached approximately US$115 billion in 2004, a 16% market share.
- Approximately 80% of all convenience stores offer food prepared on site, especially grab-and-go breakfast products.
- Energy bars were very popular snacks sold in convenience stores in 2003, with sales of US$225 million, as well as granola/fruit snacks, at US$70 million.

- In New Mexico, beer sales have dropped due to alcohol sales restrictions. There are no such restrictions in the other South Central states.
- Best selling products in convenience stores in 2003 were cigarettes with US$40 billion in sales, food prepared on site (US$15.2 billion), beer (US$12.8 billion), snacks (US$5.2 billion), and coffee (US$4.9 billion).
- Convenience store grocery sales are projected to drop 9% from 2004 to 2008.

Warehouse/Club Stores

These outlets are an increasingly important player in the retail grocery market in the US. Larger families are reaping the benefit of these stores, but statistics show that the average American family size is shrinking potentially lessening the need for "club sized", or "family sized" product packaging. However, in the South Central region where Hispanics are an increasingly important consumer market, warehouse and club stores may be at an advantage considering the average Hispanic American family is larger than the national average. In addition, with lower than average incomes and higher than average food purchases, Hispanics could very well drive the success of these stores in the South Central region.

- In the South Central Region the three major warehouse/club companies in 2005 include Sam's Club with 81 locations and Costco with 16 locations.
- Warehouse/clubs and super-centre sales reached US$60 billion in 2004, a 9% market share.
- Warehouse/clubs typically have 10% gross margins and pass these savings along to customers.
- More than half of American consumers now shop at warehouse/clubs.
- Threats to Warehouse/club retailers include the growing baby-boomer population, who do not require large size products.
- Grocery sales account for approximately one-third of warehouse/club sales and best selling products include dairy, meat, produce, and home meal replacement products.

Dollar Stores

Dollar stores in Canada and the US share various similarities, but also have some distinct variations. Although Canada has a higher dollar store penetration rate of 77% as opposed to the US at 64%, spending and visit frequency are lower in Canada[8]. The average U.S. dollar store basket ring is US$11.35 compared with CDN$9.20 in Canada and it is typical for a US consumer to visit dollar stores on a more frequent basis than their Canadian counterpart. Likewise the US has experienced recent developments in the dollar store format that include doubling store square footage and expanding product offerings to include food items including meat, produce and dairy. Dollar stores have now reached a scale where they are drifting away from buying excess inventory and discontinued products and are now looking for more stable supplies, custom packed or exclusive products.

- The growth of dollar stores is so noticeable that many large format retailers are now including "dollar aisles" in their stores.

[8] ACNielsen: Dollar Store, No Frills: The New Retail Landscape

- In the South Central Region the three major dollar store companies in 2005 include Dollar General with 1,852 locations, Family Dollar with 1,112 locations, and Dollar Tree with 308 locations.
- More than 8,000 new dollar stores are predicted to open in the US by 2010.
- Two-thirds of households in the US now shop at dollar stores.
- Low-income households are not the only dollar store customers. Households with incomes above US$70,000 increased their visits to dollar stores by 15% in 2003, while it is estimated that nearly 15% of dollar store shoppers stem from households earning an income of US$50,000 or more.
- In 2004, sales reached more than US$10 billion and are projected to grow by 6% each year, over the next five years.
- Best selling agri-food products in dollar stores are candy, snacks, frozen pizza, dairy, sugar, flour, meat, oils/shortening, diet aids, meats and seafood.
- Candy sales at dollar stores rose approximately 10% in 2003 and snacks sales rose approximately 12.9% in 2003.

2. 2004 Industry Overview – Restaurants

In 2004, the National Restaurant Association estimated that annual sales in the country are expected to reach US$440 billion, with 12 million employees and 878,000 locations. This will represent the 13th consecutive year of real growth, with a 3% real increase in total restaurant industry sales from 2003. Restaurants and bars are the primary contributors earning US$280 billion in sales in 2004. While long term prospects look positive, the food service industry continues to face challenges such as rising business costs, higher food prices, natural disasters, shaky consumer confidence, uncertain foreign and domestic issues, as well as damaging reports of obesity-related issues which have impacted this region in particular.

Favourable conditions helping the growth of the foodservice industry include the narrowing gap between the price of eating out and eating at home and the rising number of dual-earner households. Unfavourable conditions hindering the growth of the food service industry include rapidly rising fuel costs and concerns for food safety bumping up commodity costs. It is estimated that the cost of food from producers has increased by 7% since 2003.

Seven out of ten restaurants are small, independent operations. In 2003, the top 100 companies controlled 52.1% of total chain restaurant sales, worth US$150 billion. Companies are developing an assortment of restaurants to satisfy various consumer preferences. This also allows companies to leverage risk and maximize revenue through diversification.

Quick casual restaurants are the hybrid between fast-food outlets and higher-quality sit-down restaurants. In 2003, the quick casual market was pegged at US$6 billion, growing 15-20% each year and is anticipated to double in the next five years. This food sector is especially popular with affluent baby boomers and young professionals who have experienced fast food fatigue, but who lead busy lifestyles. Many fast-food outlets are redesigning their menus to mimic the selection available at quick casual restaurants.

The home meal replacement market has become a battle ground between restaurants and food retailers as they both try to serve the needs of quick casual diners. In 2003, takeout made up more than 70% of sales for the top 20 retail food companies. Within this area of the market, sales are forecasted to be US$395 million in 2003, a 15.6% increase in sales from the previous year.

Seafood appears to be in strong demand as people shy away from beef and poultry. This is due to the increased recognition of the health benefits of seafood, food safety concerns, and the demand for ethnic dishes containing seafood. In addition, sales of main dish salads at fast food restaurants grew by 12% in 2003, indicating a strong growth of low-carb diet practices and healthier eating. As a means to gain competitive advantage, companies are attempting to associate their food products with popular health-oriented brands.

Despite stronger growth trends full-service, sit-down restaurants continue to face their share of challenges including fuel, health care, and commodity prices. Meanwhile, consumer spending remains less confident due to an unstable economy. Furthermore, several legislative issues affecting full service restaurants are currently in debate: (1) increased restrictions on smoking in the workplace for restaurants and bars (2) employment compensation issues (3) minimum wage increases and (4) obesity lawsuits. All of these could have serious impacts on the growth of the restaurant industry.

Quick Casual

- Quick casual chains are heating up the South Central market at a rapid pace of 15% per year.
- Custom-made sandwich sales rose at a pace of 15% annually compared with hamburgers at 3%. These sandwiches are made with fresh and specialty ingredients which matches the demand for convenient and fresh foods.
- Also increasing in popularity are cooking techniques such as flame-roasted and fruit-wood smoked foods, as well as the option of building "personal combination meals."
- "Fresh Mex" restaurant chains, a fast growing Mexican and fast-casual niche, were estimated to make up an US$8 billion market in 2003.

Texas holds the majority of quick casual locations including Jasons Delis, La Madeleines, Café Expresses, Panera Breads and Boston Markets. Companies such as Chipotle, Baja Fresh Mexican Grill, and Qdoba Mexican Grill have also flourished in Texas. Besides these chains, independent quick casuals in the South Central Region add to the overall competitiveness within the sector.

Full Service

- Beef remains in high demand, especially premium beef including Kobe beef, 100% certified Angus or Hereford, veal, organic meats, and preservative-free sausages.
- Fish and seafood still remain the top choice for baby boomers, with shrimp being Americas most eaten seafood.
- New Asian cuisine including Vietnamese, Malaysian and Indonesian are also growing trends, as the minority population changes in the South Central Region.

- Fine-dining establishments are adding birds such as duck, capons, Guinea hen, pheasants, quail, and ostrich into their menus for todays more sophisticated diner.
- Home Meal Replacements is a major trend that full service restaurants may enter into.

With the cost gap between dining at home and dining out gradually decreasing and people enjoying increased disposable incomes, people are taking up more opportunities to diversify their food palette with the convenience of personalized service. Full service restaurants are also exploring new culinary recipes to satisfy the consumer demand for fresh and authentic food choices.

D. Identifying General Market Opportunities in the US, and Specific Market Opportunities in the Southwest US

1. Food Processing-Opportunities and Trends (all of US)

The Meat Industry:

Consumer demands for meat grew 5% between 1999 and 2004 (Euromonitor). This growth was still apparent despite industry impacting issues surrounding BSE, and the connections made between certain meats and obesity. At the same time, these factors that lessened meat consumption were countered by increasing demand within the category as a result of trend diets that called for increased protein intake.

The Poultry Industry:

Consumers like poultry because of its relative health value and low price. The poultry industry offers new product varieties like boned, marinated, breaded, and pre-cooked products. US producers have vertically integrated to lower costs and offer as much added value as possible in their product offerings.

Seafood:

The US seafood industry has grown in recent years, with consumption volume increasing by just over 6% between 1999 and 2004 (Euromonitor). It is believed that this increase was a direct result of news that certain fatty fish were good for heart health. This information along with increased marketing efforts by industry associations raised the profile of this food category as well as consumption levels among consumers. Consumers demand high-quality value-added seafood products. In the US, the seafood industry is highly fragmented; therefore, savvy marketing and production methods could allow a firm to take the lead in this market.

Considerable research has been directed towards the US seafood market, and where it plans to be over the next two decades. The Economic Research Service of the United States Department of Agriculture expects seafood to become the fastest growing sector of the US protein market. Poultry and beef will be overtaken as a result of an aging population with higher tendencies towards seafood consumption. Besides the age factor, an increase in seafood consumption will be fuelled by an ever growing Hispanic population (currently 38 million, largest ethnic group in the US) who characteristically consumer greater amounts of seafood.

This is a time for seafood exporters to recognize and prepare for a predicted boom in this industry, and a corresponding fluctuation in supply and demand issues. Likewise, exporters should keep in mind that this expanding market will be looking for product diversification at the same time. Products with added health and nutritional value, smaller portions or smart packaging ideas, as well as upscale value added seafood products will be important market niches to satisfy.

Canadian seafood exports to the US have yet to capitalize on the upward market trend within this product category. As seen in the below export totals, there is still considerable opportunity for this market to counter current downward movements.

Canada's Fish and Seafood Exports to the United States			
	2002	**2003**	**2004**
Total	$3,234,758,015	$2,979,667,637	$2,793,608,822
% change in total from previous year	N/A	-7.9%	-6.2%

Source: Statistics Canada

The Dairy Industry:

Per-capita consumption of dairy decreased slightly in 2004 to 592 lbs, this total was down only two pounds from a 2003 total of 594 lbs (15 year high).

Dairy products were sold at record high prices in 2004, but price increases did not discourage overall consumption levels. At the same time, although consumption levels remained relatively stable, consumers did react to price changes by altering their consumption of particular dairy goods. For instance, while per-capita cheese consumption increased by nearly eight tenths of a pound; ice cream consumption dropped by one pound per-capita.

Industry confirms that American, cheddar, mozzarella and ricotta cheeses account for nearly three quarters of total cheese consumption, but sales growth over the next few years is projected in the specialty cheese sub-category. Specialty cheeses range from ethnically inspired products such as asiago and havarti to cheeses featuring value added attributes such as low fat or organic content.

There is an overall trend in product extensions and broader assortment. Dairy is no longer milk, cheese and ice cream; it is variations of these classic dairy items.

Canned and Frozen Foods:

Canned:

Although there will always be a demand for canned goods, the market has experienced a slow decline over the past few years. Historic retail volumes of canned or preserved food has declined at a steady pace from a value of 6.1 million tonnes in 2003 to 6 million tonnes in 2004 and finally another drop to 5.9 million tonnes in 2005 (Euromonitor).

The canned food market carried a sales value of US$17 billion in 2004; sales are projected to remain flat for the coming years with growth only expected in the large canned fish/seafood sub sector. Generally speaking canned fish and seafood, canned meat, and canned hearty soups have seen slight market growth; while canned ready meals, canned vegetables and canned fruits have experienced a decline. Consumers view certain canned commodities as inferior to the fresh or fresh packaged counterparts that are likely to contain healthier attributes and less additives.

Where will the canned market go? Although this market has seemed to reach a peak in terms of performance, there are particular areas where manufacturers can and are focusing their product development efforts in an attempt to retain and gain market presence. Manufacturers are beginning to offer healthy, reduced carbohydrate, organic and uniquely flavoured canned food options. Likewise, as is the trend in all food categories, manufacturers are constantly looking for ways to make their existing offerings and make them even more convenient to consumers. Look for canned products to respond to consumer demand for hastier cooking time and other expediency features.

Frozen:

In 2004, frozen food sales matured slightly and represented 10% of the packaged goods segment. The frozen food category embodies the most convenient home meal possibilities. With the frozen food market continuously making strides in product diversification, growth is likely to continue. Frozen products are no longer bought for their obvious attributes, consumers are buying on the basis of value-added components that are now built into frozen food offerings; attributes such as sauces, marinades and stuffing.

For the above mentioned reasons, frozen foods have grown in retail value over the past few years, from US$23 billion in 2002, to $25 billion in 2003 and 2004 with a prediction to grow by another half billion by the end of 2005 (Euromonitor).

Despite the frozen food markets level of maturity, manufacturers are continuously developing new and innovative product offerings. Frozen foods now cater to the low-carb craze, to children, as well as those looking for all natural and organic frozen food options. In constant value terms US frozen food will likely increase by 12.6% between 2004 and 2009 (Euromonitor). Even more substantial is the expected rise in chilled processed food sales, growing approximately 28% by 2009. Ethnic flavours, private label line expansion, and greater choice of portion size will draw more consumers to chilled foods. By 2009, frozen pizza sales are estimated to increase 21% over 2004 sales. Chilled ready meal sales are also expected to see a large increase, growing 16% from 2004 to 2009.

Grain Mill Products:

The production of milled grain products for both human and animal consumption is an important industry in the United States, and the Southwest US which is a major producer of wheat, corn and rice for human consumption and sorghum, oats, and feed corn for animal consumption. Demand for grain mill products is likely to increase in the next decade as more health-conscious consumers add more high-fibre breads and cereals to their diets.

Prospects for cereals accenting health will remain bright. Nevertheless, the market will be crowded with competing brands. More microwavable or easy to prepare hot cereal products will be introduced. Likewise, building on the desire for convenience oriented products, on-the-go cereal products will continue to hit the market.

Alcoholic Beverages:

The US characteristically reports high levels of beer consumption in comparison to all other alcoholic beverage options; however, recently Americans are increasingly consuming wine and spirits. These options are now considered to be sophisticated alternatives to beer drinking, and are no longer associated only to special occasions/events. With an increase in interest towards wines, and a corresponding increase in consumption, the US wine market now offers a wide range of quality brands at reasonable prices – so as to promote wine drinking in the average household.

Looking at the numbers, total volume sales of alcoholic beverages grew by insignificant amounts from 2003 to 2004; however consumer expenditure on alcoholic beverages reached US$79.8 billion in 2003. This represented a 6% increase from 2002 and even stronger growth in 2004, with consumer expenditure increasing by 7% to US$85.7 billion (Euromonitor, 2005). This growth is a direct reflection on trends within this product category. Americans are not drinking more, but they are changing what they drink, stepping up from conventional beer consumption to imports, wine and spirits.

Key trends and developments within this category revolve around ready to drink cocktails. Coolers and cocktails that come in single serving beer-like bottles have now made their way to shelf space alongside conventional beers, and for this reason and others – these drinks have increased in popularity. It is expected that annual per capita expenditure on drinks will increase from US$528 to US$607 between now and 2009 (Euromonitor, 2005). The majority of these increases will be seen in expenditures on wine and sprits as opposed to beer.

Bottled and Canned Drinks:

Sales in the soft drink market increased slightly in sales volume and sales value in 2004 (Euromonitor, 2005). However, despite the overall growth within the category, certain products experienced considerable growth while others fail to see market expansion at all.

Carbonated drinks failed to see growth in 2004, while healthier alternatives to this once popular drink selection recorded substantial sales volume increases. Healthier alternatives include products such as fortified drinks (energy and sports drinks), bottled water, organic juices, as well as, naturally healthy juices containing ingredients beneficial to overall health.

The most extreme sales growth has been experienced in the energy drink category. These drinks appeal to a younger generation, and essentially any individual who leads a busy lifestyle and as a result is starved for time or a boost to get them through the day.

Other trends within this category include smaller service sizes as well as healthy alternative soft drinks that promise to deliver the desired taste but with less calories or sugar. This category features extreme levels of product development efforts. In such a concentrated market, manufacturers are painstakingly trying to discover those products that will capture the limited attention of the consumer.

2. Export Opportunities Particular to the Southwest US:

While Canadian products carry with them a strong reputation and ability to succeed in the US marketplace, there are some identified trends in the Southwest market that are important for Canadian exporters to address or be aware of. The following sub-categories are those that are considered export opportunities based on their current market performance and future potential.

Organics

It is no surprise that organics are developing as a strong market in the Southwest Region as people become increasingly aware of the environmental, social and health benefits associated with the production of organic foods. The demand for prepared or easy-to-prepare meals in the organic food segment is expected to expand as people look for quick, portable and healthy alternatives. Categories with strong growth potential include organic cakes and dessert mixes, ethnic food entrees, condiments, noodles and rice mixes and beverages, frozen foods, baby food and pet food.

In 2004, organic food sales are projected to surpass US$15 billion. Sales are predicted to grow 110% to reach US$32 billion in 2010, largely due to the strong growth estimated for future years. Organic dairy, breads and grains, and beverages are expected to double in sales by 2010, while fruits and vegetables are actually predicted to triple in demand. Meats and produce are anticipated to perform better in the upcoming years.

US Organic Food Market (2004)		
Category	**Market Share**	**Value**
Produce	40%	$6 billion
Packaged Foods	15%	$2.3 billion
Dairy Products	10%	$1.6 billion
Frozen Foods	9%	$1.4 billion
Soy Products	6%	$0.9 billion
Beverages	6%	$0.9 billion
Meat	3%	$0.4 billion
Snacks	2%	$0.3 billion
Other	9%	$1.3 billion
Total	100%	$15.1 billion

*All values in US dollars

Canadian exporters already have the capabilities to produce many organic foods in demand in the Southwest Region. Some of these foods and ingredients include organic beef and chicken; grains, cereals and breads; fruits and vegetables; apple products; coffee, teas and juices; ice cream; canola, safflower and sunflower oils.

Canadian manufacturers of organic foods should benefit from consumer perceptions of Canada as a clean, pure and unspoiled source of food.

Private Label Partnerships

One way to build up exports is to become a private label provider. Canadian exporters should consider the growing premium private label lines sold at many US retailers. Retailers are aggressively sourcing private label goods to add to their shelves and seek high quality products with attractive packaging. Total sales for private label products reached US$50 billion in 2004.

Developing new products suitable for premium private label lines can be profitable. Opportunities exist for quality Canadian manufacturers that can produce private label products for specific markets or who specialize in particular product lines; especially those involved in organic, ethnic or children's foods. In the Southwest Region, several private labels that are rapidly expanding include Albertsons' Essensia; Kroger's Private Selection and Naturally Preferred organics; H.E. Butt's Tellurian wines, Own Brand or H-E-Buddy for kids; and the Whole Foods Market's 365 Organic label.

Gourmet/Specialty

The increasingly sophisticated taste of the American consumer is also indicated by the rapid growth in the gourmet/specialty food market. In Texas, people tend to eat out on week nights then flock to grocery stores in attempt to recreate expensive meals for the weekend. It is estimated that supermarkets account for almost 45% of gourmet foods and beverages sales and are expected to increase by 8% to US$44 billion by 2007. Led by gourmet beverages and confectionery, the sales of specialty food will draw from synergies with the ethnic foods market and the natural foods market. Some of the emerging trends from the specialty foods market include:

- Convenience in all forms including pre-washed salads, convenient gourmet sauces, seasoned ready-to-cook meats, quick-heat fully cooked meats, single-serve bottles, and many more.
- All-natural, organic and ingredients known for their health benefits
- Focus on retro, comfort and home-style foods

E-Food and E-Pharmacy

US online grocery sales reached US$2.5 billion in 2004. Although gaining moderate revenue, sales are expected to reach US$6.5 billion by 2008. This industry represents an exciting and new growth opportunity for retailers to sell and deliver their services. With three out of four Americans enjoying Web access at home or work, companies have strong opportunities to increase their services on the Internet. Likewise, as generations who were engulfed in the internet age are shifting into older demographic categories, the kind of internet savvy required to utilize these services is now incorporated into the categories of consumers best suited to use these services. Currently, nearly 87% of supermarket companies have Web sites, a 15% gain since 1999.

For supermarkets with pharmacies, the Internet will serve as a convenient means for consumers to place online prescription refills, track prescription orders, find pharmacy location and hours of operations, as well as explore links to health-related sites. Almost 90% of supermarkets that operate store websites also have a convenient pharmacy section. In the Southwest Region, some of the retailers operating online pharmacy sections include Wal-Mart, Kroger, Albertsons, and Randall's Food & Pharmacy.

3. Other Niche Markets Particular to the Southwest US (food retail and food service)

Ethnic Foods and Ingredients

The emergence of the Hispanic and Asian populations indicates a shift in demographics in the US Southwest. Currently the US retail ethnic food market is valued at US$26 billion. The composition of the ethnic food market by cuisine/sales in 2002 can be broken down into three major categories:

- Hispanic foods: US$2.5 billion (67%)
- Asian foods: US$837 million (22%)
- Emerging Ethnic Foods: US$400 million (11%) - including Caribbean, Indian, Middle Eastern and Greek foods

In the Hispanic foods market, there is a strong demand for foods that emphasize hot and fiery tastes. In the Asian food market, Pan Asian and Fusion cuisine ingredients have gained popularity while pre-made sushi and chai continue to be in high demand. There is also much interest in the emerging cuisine market with concentration on the Caribbean, Mediterranean, Middle Eastern, African, and Indian cuisine. Chiles, spice blends, sweet & sour concoctions and piquant fruit dressings are increasing in popularity as people crave authentic culinary experiences.

The increased diversity of demographics in the Southwest Region is being echoed in more global menus, as dishes from different ethnicities make their way into mainstream consumption patterns of sophisticated American consumers. Consumer preferences are changing the face of the restaurant and food retail industry; for instance new restaurants and menus are incorporating:

Organic-certified	Live sushi bars	Bakery sandwich
Vietnamese	Haute Indian	Fresh Mex
Thai	French bistros and Provencal	
Noodle shops	Tapas restaurant/bars	

Canadian exporters have demonstrated the ability to deliver many products that are in demand in the Southwest Region. The following is a list of products that are common to all ethnic cuisine trends in the Southwest Region and can be exported by Canadian companies.

Shrimp	Goat	Chillies
Lobster	Spicy sausage	Oregano

Crab	Meat pies	Bay leaves
Salmon	Ethnic beef stew	Laurel leaves
Mackerel	Ethnic chicken stew	Black bean soup
Ackee	Tofu	Chickpeas
Saltfish	Vegetarian dishes	Cranberry
Cod	Dark chocolate	Zucchinis
Scallops	Garlic	Tomatoes
Calamari	Ginger	Potatoes
Calf brains, kidneys	Coriander	Mushrooms
Beef	Cinnamon	Peppers
Lamb	Curries	Olives
Pork	Cilantro	Almonds
Chicken	Cumin	Sparkling waters

Hispanic/Latino

This market includes South American, Spanish and Portuguese foods. In 2003, approximately 25% of the Southwest population were Hispanic persons. Nuevo Latino cuisine is Latin dishes made with an American twist. Some recent product trends include ceviche, curtido, pupusas, paella, fabada, tapas, slow-roasting dishes, dulce de lèche, tres lèches, plaintains, cherimoya fruit, pico de gallo, and Mateus wines. Popular flavours also include lemon Cajun, chipotle, mesquite, and chimichuri.

Caribbean & Central America

This market includes foods from Cuba, Dominican Republic, Puerto Rico, Jamaica, Guatemala, Costa Rica, El Salvador, and more countries. Cocina criolla is Puerto Rican cuisine which has become very popular in the US. Recent product trends include jericalla, picos bread, sautéed or slow-cooked dishes, croquetas, empanadas, pastelitos, bocaditos, maduros, congri, piraguas, gizzadas, root vegetables, avocado, pumpkin, onions, yautias, bacalaitos, cornmeal, fish soup, caldo gallego soup, and preserves. Key flavours include sofrito sauce, jerk, mojo, guava, mango, coconut, and papaya.

Pan-Asian

This market includes Chinese, Japanese, Thai, Korean, Vietnamese, Cambodian, Filipino, and Malaysian foods. In 2003, Asian Americans and Pacific Islanders represent over US$340 billion of total purchasing power. This group now makes up 4.4% of the US population. The biggest Asian population segment is Chinese Americans. This group has grown nearly 50% between 1990 and 2000. Texas has the third largest population of Asian and Pacific Islanders in the US, after California and New York. Almost all persons in this group live in a metropolitan area.

Product trends in Asian food include artisan sake, Asian BBQ, spring rolls, edamame, Kobe, panko, prawns, squid, octopus, clams, raw foods, cabbage rolls, gourmet noodles and toppings, furikake rice seasonings, dumplings, dim sum, and hot and sour soup. Popular flavours and ingredients include soy, peanut sauce, hoisin, wasabi, miso and cardamom.

Indian

This market includes Indian, Pakistani, and Sri Lankan foods. Asian Americans of Indian origin are the fastest growing major demographic group. This group grew 105% between 1990 and 2000. In 2000, there were 1.7 million Asian Indian persons in the US. At current growth rates, Indians will be the largest ethnic Asian population by 2010.

Indian food includes both vegetarian and non-vegetarian cuisine and dishes from specific regions of the country. Product trends include Mughlai and Tandoori dishes, aduki beans, black-eyed peas, rice beans, coconut milk, eggplant, mangoes, okra, palm sugar, saffron, tamarind, masala spice blends, basmati rice, flat breads, rice cakes, mango chutney, achar relishes, and raita yogurt salad.

Mediterranean

This market includes foods from Greece, Israel, Spain, France and the Middle East. Product trends include panna cotta, gnocchi, frozen custard, tabouli, escargot, flatbread pizza, gyros, falafel, feta and ricotta cheeses, stufffed grape leaves, keftas, moussaka, baklava and artichokes. Current flavours trends and ingredients include pesto, balsamic vinegar, and honey dijon.

Other Trends

Several other trends are occurring in the Southwest Region which may be opportunities for Canadian exporters. The trends in artisan and specialty cheeses include Paneer, Chevre, Crottin de Chavignol, Chevrefeuille, Roquefort, Manchego, Perail, Ricotta and Feta. Exotic teas with emphasis on Asian varieties including green tea, chai, herbal, yerba mate, rooibos, oolong, bubble, organic, iced and decaffeinated. Other beverages trends include specialty coffees, ice wine, sparkling wine, flavoured water, and sparkling water and sport beverages.

This particular region offers a favourable climate for Canadian exporters to test new markets. This region has a large and diverse consumer base and abundant urban centres; as a result the region encapsulates trends that extend through all regions of the country. This region has the potential to be a successful bridge into the US market; careful export planning and the unique opportunities this region offers contribute to this potential. Likewise, a region with such diversity presents numerous niche markets. These smaller markets with distinct tastes, needs and preferences are often easier for an exporter to target.

E. Addressing/Approaching Market Opportunities in the US Southwest

1. Consolidation and Proliferation Too

The number of food manufacturing and distribution companies is multiplying as new entrants make their debuts.

In a market that has such saturation in terms of products, there have to be distinct aspects that make you and your product stand out. Not only does you product have to be a great one, your approach to selling your product and managing your export endeavour have to be equally great. There are a number of guidelines that indicate who will make it. First, newcomers have to have a reason for being - a niche that needs to be filled. They have to define their objectives and they have to have financial discipline.

2. The 15 P's of Exporting

1. Plan

You must have a marketing and business plan. Define your strategy, time table, costs, staff and money requirements, and long term goals. This must have top management approval and commitment. The distributor, broker, retailer and consumer must be convinced that you are here to stay. Permanence must be perceived. What will your competition be doing?

Many exporting companies begin their business without the proper preparations. Without screening markets and laying out a strong plan, your chances for success are diminished. At the same time, the better you plan the better your resources are used. Be advised that export marketing plans should be dynamic; always review an export marketing and business plan throughout the exporting process to build and improve your business foundation. Finally, ensure that you have built in certain performance measures to determine if you are drawing the greatest output from all your hard work and input.

2. Product

Do you have a product(s) that is market ready - packaged and ready to sell? Is it acceptable to the market you intend to enter - taste, local habits, and ethnic acceptance? If your product is unique, how will you influence people to try it? What will sell in that market?

Ensure that there are differentiation factors that separate your product from the competition. The moment a retailer decides to incorporate your product into their mix, generally speaking a competitor is taken away. There is limited space in the market, and by differentiating your product you have made a smart marketing move. Remember you can distinguish your product based on the product itself, the price, how you promote you product or how you product is packaged.

3. Package

Is your package ready for the consumer, retailer, and market(s) that you are intending to enter - label, size, language, ecology, and convenience? What will sell in that market?

Besides the importance of grabbing the consumer's attention with your packaging, it is important to meet the country requirements pertaining to packaging and labelling. This is an important consideration when exporting to any international market, in this case the US. The FDA has published a food labelling guide which is directly applicable to the subject of packaging. Access to this guide is available through our market information section for the US, under Market Access-Other Considerations and Resources **http://ats.agr.ca/us/access_us_e.htm** .

4. Price

Are you pricing to sell compared to competition? Have you priced competitors? Do you know all costs, landed in the export market that you intend to enter? What will sell in the market?

Price is one of the key factors that will determine if your product will be competitive in an export market. What is the approximate selling price of your product? Base this price on some of the current competitor pricing you can find; deduct freight, duty, insurance, fees for agent representation and other export costs. If the resulting number still provides a reasonable profit margin from you perspective – then you have identified yourself as a possible contender in the market when it comes to pricing.

5. Preparation

Have you arranged for the appropriate inspections, sampling, stocks, lead times, and customs clearance? Are you prepared to sell in the export market? Have you selected a distributor or arranged for distribution? Have you considered a co-packer in the export country? Have you selected a broker or retained the representation you will need? Is your product available?

Remember that preparing to export requires preparations at home before you proceed with exporting and preparations in accordance with your export market's regulations and guidelines. The ATS website features information on these two areas of important in the Exporter Requirements section as well as the Market Information-Market Access section.

6. Perception

How will your product be perceived by the customer, the buyer, the retailer, the distributor, the broker? Will their perception be what you intended it to be. What will it take to have them perceive, and accept the product?

7. Placement

Where will the product fit in the store? How many different departments and sections in the store will be accepting of the product? Be sure you are talking with the appropriate buyer, distributor, and broker - for the placement of the product. Can your product be "tied-in" with other products and promotions?

8. Promotion/Program

You must have a well thought out program of promotional activity to sell your product(s) in the introductory period, in the following weeks and months, and in year two and year three. The program must appeal to the distributor, broker, retailer, wholesale buyer, store owner, and customer. Is your program in print and documented for the customer? What promotion will sell in that market?

TRADE SHOW PROMOTION

Trade show attendance and selling may seem straight forward to most. The fact of the matter is, trade show selling can be effective – if it is prepared for and handled in a professional and well thought out manner. Consult our ***"Superior Trade Show Execution making 'Face to Face' Marketing Work***" document - **http://www.ats.agr.gc.ca/events/4004_e.htm** and consider the following points:

Set Measurable Sales Goals:

A. To begin, set measurable sales goals before each show. Goals should be realistic, quantifiable and linked to a time frame:

1. Find x new prospects to convert to sales in 90 days
2. To obtain x commitments to purchase in x days

B. Time frame should tie into selling cycles and trade show efforts should be integrated with other marketing strategies:

1. Sales and Promotional Program
2. Food Section Newspaper Article or Recipes
3. Preparation of Catalog Sheets
4. Preparation of Price Lists
5. Mailings of literature to prospects (we'll see you at x show, in booth x)
6. Mailing of samples to prospects
7. Phone calls setting time and pr/appointments of seeing each other at the trade show
8. Ascertaining who the appropriate contact is; when; how

C. Follow-up is critical, whether by phone, mail, in person, etc.

D. Develop and promote an effective message.

1. Buyers need to know how your product and program will meet theirs, and their customer needs. They are looking for solutions, for answers, for applications

E. How do you know what buyers needs are?

1. Ask 25 prospects, present customers, consumers, etc. what they are interested in (ingredients, convenience, packaging, deal, price, uniqueness, quality, etc.)
2. Design your program, printed material, verbal presentation, graphics in-booth, to meet these needs.

F. People are looking for ideas - sell ideas that they use.

* Product Use
* Programs
* Health Benefits
* Store Placement
* Uniqueness

G. "Sell" to the right person. Develop a technique for quickly identifying those prospects that are worthy of your full presentation.

1. How are you familiar with our product, company, program, or competitive products?
2. Have you had any previous information on us?
3. What do you want to know about our products and programs?
4. How do you intend to present our product to retailers?
5. Who/when/how will the purchasing decision be made?

HINT: Many exhibitors prevent buyers from entering their booth by putting a table across the front - this forces the buyer to remain in the aisle - The Non-Committal Area.

CLOSING: Follow-up! Promote! -- "We have not made a sale until the consumer uses up the product!

9. Proof

You must test market your product, package, program, perception - and summarize the results. The results of your test marketing, and the necessary changes resulting from your test(s) become the proof that the product will sell - document your proof for the buyer.

10. Performance

Compile data on product sales, growth, profit dollars and income for retailers, brokers and distributors. How the product performed becomes the basis for future sales. Tell everyone how they did, and how you plan to help them grow and profit with you in the future. Review your business plan with them. These are the types of performance measurements that are necessary to ensure that you and your business partners are getting most out of your product and your business arrangement.

11. Persistence

Are you prepared to continually call on buyers, distributors, brokers, store owners, in-store customers - until you make the sale? Are you prepared to continue to follow-up after the first sale? Whatever it takes....it is about being persistent.

12. Perseverance

Do you have the staying power.... to commit to the effort?

- Product inventory
- Financing

- People
- Overcoming adversities and disappointments

13. People

Are you committing enough of management and staff time to the export market? Do you have the people to maintain your ongoing business and this new segment of your business? Do you have the right people, the right distributor, and the right broker?

14. Professionalism

Is your organization professional?

- People
- Product
- Package
- Promotion
- Proof
- Plan
- Print Material

Do you and your offering fit into the environment that you are entering? Is your buyer presentation rehearsed and ready?

This leads into another P…

15. Presentation (buyer presentation)

Making a buyer presentation in the United States can be the make or break moment for you and your product. In such a saturated market there is often little room for new products. At the same time, it is a market that is in constant search for new and innovative products that promise to bring something new to the table. That being said, when it comes times to present your product to a potential business partner, you have a few moments to reveal the most important aspects of this product and win over your audience. A few things to keep in mind:

- Before arranging your buyer presentation, have you done your homework? Have you researched a company, found out about their size their growth, their quality requirements etc.
- When you call to make an appointment, do it three or more weeks in advance, speak directly to the buyer, make a short introduction and ask for a 15-30 minutes appointment – always ask if they want samples prior to the appointment (especially for private label).
- At the appointment, dress professionally, arrive early, have distinct goals to meet during your short session. Have an outline to your presentation, but ensure that it does not seem too rehearsed; you want this interaction to be dynamic and natural.
- Make you presentation personalized to the client you are visiting, have a personalized folder detailing the qualifications of your company, have samples

and more importantly have your capabilities outlined. Make sure there are no false expectations on either end of the business arrangement.

- In your presentation include you US price, be prepared for negotiation, take notes, be accurate when it comes to the scale of business you desire and you are capable of accomplishing, end the presentation with a "call for action".
- Follow up. Depending on the outcome of your presentation the follow up required can vary. Whatever the follow-up required, make it prompt. If the initial buyer presentation was not successful do not give up, be persistent.

3. Most Common Mistakes Made by New-To-Export Firms

- Failure to obtain qualified export counselling and to develop a master international marketing plan before you start an export business.
- Insufficient commitment by top management to overcome the initial difficulties and financial requirements of exporting.
- Insufficient care in selecting overseas agents or distributors.
- Chasing orders from around the world instead of establishing a basis for profitable operations and orderly growth.
- Neglecting export business when domestic business booms. Likewise, neglecting domestic business when exporting becomes a planned business endeavour.
- Failure to treat international distributors on an equal basis with domestic counterparts.
- Unwillingness to modify products to meet regulations or cultural preferences of other countries.
- Failure to print services, sales, and warranty messages in locally understood languages.
- Failure to consider use of an export management company or other marketing intermediary.
- Failure to consider licensing or joint-venture agreements.

F. Marketing Channels and Distribution –

1. Retail Market Shares 2004

ARKANSAS

State Market Shares – FOOD RETAILERS

Retailer	# Stores	% Market
Wal-Mart Superctr.	53	45.03
Kroger	41	12.38
Harp's	37	7.74
Smkt. Inv.	28	3.75
Brook. Groc.	14	2.42
Wal-Mart Neigh.	6	2.85
Town & Ctry.	13	1.84
C.V. Food	12	1.24
Hays	10	1.24
Mad Butcher	8	1.18
Ellison	7	1.14

Food Giant	11	0.96
Sexton	8	0.88
G&W	10	0.80
Knight's	4	0.79
Marvin's UGA	5	0.68
All Ohers	144	15.08
Total	**411**	**100**

Source: The Shelby Report, December 2004

Little Rock, AR

Retailer	**# Stores**	**% Market**
Wal-Mart Superctr.	10	36.51
Kroger	21	34.50
Supermarket Inv.	18	9.86
Wal-Mart Neigh.	1	2.70
Harp's	2	2.32
Knight's Inc.	3	2.28
Millitary	1	2.28
Wild Oats	1	0.59
All Others	24	8.96
Total	**81**	**100**

Source: The Shelby Report, December 2004

KANSAS

State Market Shares – FOOD RETAILERS

Retailer	**# Stores**	**% Market**
Dillon Food	77	29.10
Wal-Mart Superctr.	33	23.45
Ball's	19	7.15
Hy-Vee	13	5.94
Falley's	27	5.32
Target	5	2.05
Cosentino's	5	1.63
Price Chopper	4	1.51
McKeever Ent.	4	1.43
Military	3	1.41
Aldi	22	1.40
Wal-Mart Neigh.	3	1.31
Leeker's Fds.	5	1.15
Country Mart	4	0.78
White's	6	0.64
All Others	164	15.73
Total	**394**	**100**

Source: The Shelby Report, December 2004

Kansas City, KS

Retailer	**# Stores**	**% Market**
Wal-Mart Superctr.	15	18.33
Ball's	29	16.48
Hy-Vee	22	15.32
Cosentino's PC	21	11.03
McKeever Ent.	8	5.51
Dillon	7	3.78
Target	6	3.7
Price Chopper/Paola	4	2.22

Wal-Mart Neigh.	3	1.91
Aldi	19	1.77
Niemann	7	0.97
Military	1	0.84
C&J Management	3	0.68
Meiner's Thriftway	2	0.64
Falley's	2	0.62
Wild Oats	3	0.59
My Foods Thriftway	3	0.59
Passantino's Sun Fresh	2	0.53
All Others	85	13.17
Total	**242**	**100**

Source: The Shelby Report, December 2004

LOUISIANA

State Market Shares – Food Retailers

Retailer	**# Stores**	**% Market**
Wal-Mart Superctr.	54	33.69
Winn-Dixie	78	15
Brook. Groc.	40	7.26
A&P	23	6.28
Albertsons	24	6.35
Kroger	11	2.73
Rouse Ent.	15	2.17
M&E Food	14	1.07
SE Foods	11	1.04
Save-A-Lot	10	0.91
Military	3	0.78
Target	3	0.76
All Others	291	21.96
Total	**577**	**100**

Source: The Shelby Report, December 2004

New Orleans, LA

Retailer	**# Stores**	**% Market**
Winn-Dixie	33	28.97
Wal-Mart Superctr.	10	22.96
A&P	21	21.13
Save-A-Lot	7	2.46
Robert's Resources	5	1.75
Breaux Mart	4	1.7
Rouse Ent.	3	1.54
Whole Foods	2	1.37
Frank's Supervalu	2	0.65
Military	1	0.50
All Others	53	16.97
Total	**141**	**100**

Source: The Shelby Report, December 2004

NEW MEXICO

State Market Shares – RETAILERS

Retailer	**# Stores**	**% Market**
Wal-Mart Superctr.	23	32.73

Smith's	25	17.47
Albertsons	23	16.44
Raley's	9	4.12
Lowes	15	3.88
Military	4	2.35
JHB Inc.	11	2.26
Safeway	4	1.84
DPI SW	5	1.20
Fenn Folds	3	1.02
All Others	79	16.69
Total	**201**	**100**

Source: The Shelby Report, December 2004

Albuquerque, NM

Retailer	**# Stores**	**% Market**
Smith's	16	28.70
Wal-Mart Superctr.	7	26.30
Albertsons	10	16.25
Raley's	8	9.15
Military	1	3.50
JHB Inc.	6	3.25
Lowes Pay n' Save	3	1.58
Wild Oats	3	1.58
Whole Foods	1	0.83
DPI Southwest	1	0.83
Sunflower Mkts.	1	0.83
All Others	16	7.20
Total	**73**	**100**

Source: The Shelby Report, December 2004

OKLAHOMA

State Market Shares – RETAILERS

Retailer	**# Stores**	**% Market**
Wal-Mart Superctr.	49	39.28
Albertsons	31	9.32
Homeland	45	7.36
Wal-Mart Neigh.	14	5.28
Reasor's	12	4.59
Warehouse	15	3.20
United S.	26	2.98
Crest Disc.	4	2.88
Buy for Less	9	2.37
Marvin's IGA	16	1.72
Military	4	1.57
GLN Inc.	8	1.16
Harp's	9	1.02
WenJeST	9	0.99
Target	3	0.95
Steppig	11	0.83
All Others	152	14.50
Total	**417**	**100**

Source: The Shelby Report, December 2004

Oklahoma City, OK

Retailer	# Stores	% Market
Wal-Mart Superctr.	13	33.30
Albertsons	14	13.30
Wal-Mart Neigh.	9	10.36
Crest Discount	4	8.62
Homeland	14	7.31
Buy for Less	9	7.08
Military	1	2.43
Target	2	1.82
WenJeST Corp.	5	1.79
Steppig Foods	5	1.21
All Others	39	12.78
Total	**115**	**100**

Source: The Shelby Report, December 2004

TEXAS

State Market Shares – RETAILERS

Retailer	# Stores	% Market
Wal-Mart Superctr.	210	24.92
H.E. Butt	281	22.52
Kroger	205	11.03
Albertsons	159	7.11
Tom Thumb	71	4.18
Randall's	67	3.81
Brook. Groc.	94	2.85
Fiesta Mart	50	2.49
Minyard	71	2.40
United S.	47	1.90
Target	31	1.86
Brook. Bros.	67	1.40
Wal-Mart Neigh.	26	1.23
Military	11	0.80
Lowes	49	0.71
All Others	688	10.79
Total	**2,127**	**100**

Source: The Shelby Report, December 2004

Dallas, TX

Retailer	# Stores	% Market
Wal-Mart Superctr.	32	20.95
Tom Thumb	52	17.32
Albertsons	69	16.48
Kroger	49	14.19
Minyard	49	9.41
Brookshire Groc.	19	3.43
Target	9	3.36
Wal-Mart Neigh.	11	2.94
Fiesta Mart	9	2.67
H.E. Butt	4	2.34
Whole Foods	5	1.16
Save-A-Lot	9	0.82
Malone's	7	0.76
All Others	58	4.17

Total	**382**	**100**

Source: The Shelby Report, December 2004

Fort Worth, TX

Retailer	**# Stores**	**% Market**
Wal-Mart Superctr.	19	25.07
Albertsons	34	19.07
Kroger	29	13.74
Tom Thumb	18	11.02
Minyard	21	7.24
Target	7	4.77
Wal-Mart Neigh.	6	3.57
Brookshire Grocery	8	2.74
H.E. Butt	2	2.36
Save-A-Lot	11	1.87
Fiesta Mart	5	1.68
All Others	40	6.87
Total	**200**	**100**

Source: The Shelby Report, December 2004

Houston, TX

Retailer	**# Stores**	**% Market**
Kroger	109	26.90
Wal-Mart Superctr.	41	20.97
H.E. Butt	56	13.78
Randall's	51	12.71
Fiesta Mart	34	7.31
Lewis Food Town	15	2.31
Target	10	2.24
Gerland's	15	1.90
Wal-Mart Neigh.	8	1.32
Sellers Brothers	10	1.20
Brookshire Brothers	12	1.15
Foodarama	9	0.93
All Others	104	7.28
Total	**474**	**100**

Source: The Shelby Report, December 2004

El Paso, TX

Retailer	**# Stores**	**% Market**
Wal-Mart Superctr.	6	33.48
Big 8 Foods	13	19.40
Albertsons	8	18.93
Military	1	5.26
Lowes Pay n' Save	4	4.11
Food City	3	3.10
Quality Food	5	2.35
Wal-Mart Neigh.	1	1.98
Food Basket	1	0.78
Sun Harvest Farms	1	0.78
All Others	11	9.83
Total	**54**	**100**

Source: The Shelby Report, December 2004

San Antonio, TX

Retailer	# Stores	% Market
H.E. Butt	51	63.97
Wal-Mart Superctr.	14	21.30
Military	3	4.54
Grocers Supply	12	2.30
Target	3	2.08
Mass Marketing	11	1.70
Foodarama	7	1.47
Sun Harvest	3	0.63
Albertsons	1	0.59
Whole Foods	1	0.33
All Others	8	1.09
Total	**114**	**100**

Source: The Shelby Report, December 2004

2. Wholesale Market Shares 2004

ARKANSAS

State Market Shares – WHOLESALERS (retail customers' share of market total)

Wholesaler	# Stores	% Market
AWG	144	20.78
Affiliated SW	89	9.42
Supervalu	16	2.65
Save-A-Lot	21	1.72
All Others	22	2.07
Total	**292**	**36.64**

Source: The Shelby Report, December 2004

KANSAS

State Market Shares – WHOLESALERS (retail customers' share of market total)

Wholesaler	# Stores	% Market
AWG	157	28.24
Affiliated Co.	48	3.72
Supervalu	6	1.85
All Others	31	3.3
Total	**242**	**37.11**

Source: The Shelby Report, December 2004

LOUISIANA

State Market Shares – WHOLESALERS (retail customers' share of market total)

Wholesaler	# Stores	% Market
AG B/R	156	12.75
Supervalu	47	4.44
Affiliated SW	59	3.95
Grocers Supply	29	2.08
Save-A-Lot	20	2.05
All Others	28	2.29
Total	**339**	**27.56**

Source: The Shelby Report, December 2004

NEW MEXICO

State Market Shares – WHOLESALERS (retail customers' share of market total)

Wholesaler	# Stores	% Market
Affiliated Fds.	90	20.87
Groc. Supply	4	2.35
Rainbow	5	1.20
Grocers Supply	2	0.67
AWG	2	0.67
All Others	13	3.05
Total	**116**	**28.81**

Source: The Shelby Report, December 2004

OKLAHOMA

State Market Shares – WHOLESALERS (retail customers' share of market total)

Wholesaler	# Stores	% Market
AWG	196	32.31
Affiliated Foods	38	4.04
Save-A-Lot	25	2.73
Affiliated SW	24	2.51
Tree of Life	3	0.21
All Others	28	2.44
Total	**314**	**44.24**

Source: The Shelby Report, December 2004

TEXAS

State Market Shares – WHOLESALERS (retail customers' share of market total)

Wholesaler	# Stores	% Market
Grocs. Sup.	471	9.53
Save-A-Lot	68	2.40
Affiliated Foods	110	1.51
All Others	170	2.56
Total	**819**	**16.00**

Source: The Shelby Report, December 2004

3. Major Retail Food Stores - Southwest US Headquarters:

(This list is a revised version of lists that were generated in the late 1990's, to the best of our ability we have compiled a list of major food stores and other distribution channel players – this list by no means covers all those who fall into these particular categories. Should you have information/details on an organization that should be included in this list please contact the ATS representative mentioned on the cover of this document.)

ALLSUP'S CONVENIENCE STORES 2112 N THORNTON ST CLOVIS, NM 88101 Telephone: (505) 7692311 Fax: (505) 7692564	HARP'S FOOD STORES INC 918 S. Gutensohn Rd. SPRINGDALE, AR 72762-5165 Telephone: (479) 7517601 Fax: (479) 7513625

Details: Represents approximately 300 stores in small town or roadside locations in New Mexico and Texas. **www.allsups.com**	Details: Represents 50 grocery stores located primarily in Arkansas but also with locations in Missouri and Oklahoma; operates under Harp's food stores and Price Cutter Food Warehouse banners.
BROOKSHIRE BROTHERS INC 1201 ELLEN TROUT DR LUFKIN, TX 75904 Telephone: (936) 6348155 Fax: (936) 6334611 Details: Supermarket chain with 70 locations spanning Louisiana to Central Texas. **www.brookshirebrothers.com**	HOMELAND STORES, INC 28 E. 33rd St. Edmond, OK 73103 Telephone: (405) 2162000 Fax: (405) 2162282 Details: Supermarket chain with 40+ stores all located in Oklahoma. **www.homelandstores.com**
BROOKSHIRE GROCERY COMPANY 1600 SW LOOP 323 TYLER, TX 75701 Telephone: (903) 5343000 Fax: (903) 5342206 Details: This company has grown into a chain of approximately 150 Brookshire, Super1 Food and Olé Foods Supermarkets in the areas of Texas, Arkansas, Louisiana and Mississippi. **www.brookshires.com**	MINYARD FOOD STORES INC 777 FREEPORT PKY COPPELL, TX 75019 Telephone: (972) 3938700 Fax: (972) 4629407 Details: Operates 70 supermarkets located for the most part in Dallas and Fort Worth area, these include 30 Minyard Supermarkets, 20 Sack n Save Warehouse Food Stores, 25 Carnival Food Stores that cater to Hispanic consumers, as well as, 14 On the Go Gas and Convenience locations. **www.minyards.com**
DILLON COMPANIES INC 2700 E. 4th Ave. HUTCHINSON, KS 67504-1608 Telephone: (620) 6636801 Fax: (620) 6693160 Details: This is a regional supermarket chain that operates over 110 stores under a multitude of banners. **www.dillons.com**	RANDALL'S FOOD MARKETS, INC 3663 BRIARPARK DR HOUSTON, TX 77042 Telephone: (713) 2683500 Fax: (713) 2683812 Details: This is a chain that focuses on upmarket shopping, with all stores located in Texas' four largest markets of Austin, Dallas, Fort Worth and Houston. They represent nearly 140 stores under a number of names. Subsidiary of Safeway. **www.randalls.com**
E-Z MART STORES INC 602 W Falvey Ave. Texarkana ,TX 75501-1426 Telephone: (903) 8326502 Fax: (903) 8323731 Details: A convenience store chain that boasts 85 locations in the states of Arkansas, Louisiana, Missouri, Oklahoma and Texas. **www.e-zmart.com**	SAVE-A-LOT FOOD STORES INC. 100 Corporate Office Drive. St. Louis, MO 63045 Telephone: (314) 5929100 Fax: (314) 5929619 Details: Discount grocery chain representing 1300 stores in 39 different states which include those in the Southwest region. **www.save-a-lot.com**
FALLEY'S, INC. 3120 S KANSAS AVE TOPEKA, KS 66611-2219 Telephone: (785) 2671501 Fax: (785) 2744005 Details: Responsible for the operation of 25	SSP PARTNERS 4433 Baldwin Blvd. Corpus Christi, TX 78408 Telephone: 18005693585 Fax: (361) 8842494 Details: Operates 310 convenience stores

supermarkets under the Falley's and Food for Less names in both Kansas and Missouri.	in Texas.
FFP OPERATING PARTNERS, L.P. 2801 GLENDA ST FORT WORTH, TX 76117-4391 Telephone: (817) 8384700 Fax (817) 8384799 Details: Operates approximately 280 convenience stores under the names of Pantry, Nu-Way, Economy Drive-Inc and Taylor Food Mart. **www.ffpmarketing.com**	UNITED SUPERMARKETS LTD. 7830 LUBBOCK, TX 79423 Telephone: (806) 7910220 Fax: (806) 7917491 Details: 50 supermarkets that are in mostly rural locations. **www.unitedtexas.com**
FIESTA MART INC 5235 KATY FWY HOUSTON, TX 77007 Telephone: (713) 8695060 Fax: (713) 8696197 Details: Operates about 50 stores in Texas that feature both ethnic and conventional grocery items. They feature many items that are popular with Mexican or Asian American backgrounds. They are located mainly in Houston, but can also be found in Dallas, Fort Worth and Austin. **www.fiestamart.com**	W H BRAUM INC 3000 NE 63RD ST OKLAHOMA CITY, OK 73121 Telephone: (405) 4781656 Fax: (405) 4752460 Details: Operates 250 Braums Ice Cream and Dairy stores in 5 of the Southern States. **www.braums.com**
GERLAND'S FOOD FAIR INC 3131 PAWNEE ST HOUSTON, TX 77054-3302 Telephone: (713) 7463600 Fax: (713) 7463621 Details: Operates a over a dozen stores in Houston and surrounding area **www.gerlands.com**	WHOLE FOODS MARKET INC 550 BOWIE ST. AUSTIN, TX 78703-4677 Telephone: (512) 4774455 Fax: (512) 4827000 Details: Food stores that feature products that are pesticide, preservative, sweetener and cruelty free. It is considered the world's number one natural food chain with 175 stores in 28 states, Canada and the UK. **www.wholefoods.com**
H E BUTT GROCERY CO 646 S MAIN AVE SAN ANTONIO, TX 78204 Telephone: (210) 2468000 Details: Texas' largest private company and number one food retailer in the South and Central Texas regions. This name represents 300 supermarkets, and is growing their number of large format 70,000 square ft. plus market stores. **www.heb.com**	7-ELEVEN INC. (formerly Southland Corporation) 2711 N HASKELL AVE. DALLAS, TX 75204 TELEPHONE: (214) 8287011 FAX: (214) 8287848 DETAILS: The world's largest chain of convenience stores with a total of 5800 locations in the US and Canada. **www.7-eleven.com**

4. Major Wholesale Grocers - Southwest US Headquarters:

Details on Wholesaling:
In the food industry there are three different food wholesaler classifications.

- *Merchant Wholesalers*: generally buy and resell food, collect it for distribution, handle the transportation logistics and send the food off to retailers and foodservice establishments.
- *Manufacturer's sales branches*: these branches are held by manufacturers in an effort to market their products at the wholesale level.
- *Agents and Brokers:* buy and sell goods that are officially owned by another party, and collect commission on the goods that are sold.

Grocery wholesalers are typically classified according to the products that they carry. *Specialty wholesalers* often specialize in a certain food category such as dairy or fresh produce. *Miscellaneous wholesalers* distribute products such as baked goods and canned goods; while *General Line wholesalers* sell a wide range of products from dry goods to perishable items.

In today's food industry, nontraditional relationships between wholesalers and retailers are becoming more prevalent, and of course more popular as a result of the added benefits such an arrangement brings. Essentially, chains like Wal-Mart, Safeway and Kroger to name a few – are now classified as self-distributing retailers. In such a case, manufacturers deliver directly to the retailers who have their own "distribution centers". Such a set-up reduces expenses and ensures that stock is replenished promptly and on an as needed basis. An extension of this set-up is the *Efficient Consumer Response* (ECR) initiative; where products are categorized and based on sales and popularity replenished at the appropriate rates to ensure availability, freshness and an overall reduction in inventory for retailers.

When it comes to foodservice distribution channels there are also certain distributor classifications to be aware of. *Broadliners* offer everything – they generally carry a wide range of food, equipment and the necessary supplies for the foodservice industry. *Specialty distributors* focus on a particular product or customer category; where *Systems distributors* generally serve larges chains and offer low rate and reliable delivery for clients such as hospitals or convenience stores.

Like the retail sector, the food wholesale sector is also consolidating as a result of numerous acquisitions. This consolidation has happened both vertically and horizontally with some wholesalers acquiring retail outlets. The end result is a more efficient set up, and one that often gives the company the ability to perfectly tailor their operations to the particular region they are in.

AFFILIATED FOODS INC 1401 FARMERS LANE AMARILLO, TX Telephone: (806) 3723851 Fax: (806) 3723647 Details: Distributes food to member stores in Arizona, Kansas, New Mexico, Oklahoma and Texas. **www.afiama.com**	MARKETING MANAGEMENT INC 4717 FLETCHER AVE FORT WORTH, TX 76107 Telephone: (817) 7314176 or 18004332004 Details: Integrated sales and marketing company. **www.mmi-home.com**
AFFILIATED FOODS SOUTHWEST INC. 1401 FARMERS LANE LITTLE ROCK, AR 72203	MARRONE'S INC P.O. Box 600 Pittsburgh, KS 66762-0600

Telephone: (501) 4553590 Fax: (501) 4556525 Details: This is a wholesale cooperative that distributes food products to hundreds of independent stores in the states of Arkansas, Louisiana, Texas, Oklahoma and Tennessee. **www.affiliatedfoods.com**	Telephone: (620) 2316610 Fax: (620) 2316719 Details: Full line foodservice distributor serving the areas of Oklahoma and Arkansas. **www.maronesinc.com**
AFFILIATED FOODS MIDWEST 1301 OMAHA AVE. NORFOLK, NE 68702 Telephone: (402) 3710555 Fax: (402) 3711884 Details: Affiliated foods Midwest supplies over 850 independent food retailers in 12 Midwestern states. They have two major distribution centres in Kansas. **www.afmidwest.com**	MCLANE COMPANY, INC 4747 MCLANE PKY TEMPLE, TX 76504 Telephone: (817) 7717500 Fax: (817) 7717244 Details: Wholesale distributor that handles food and non-food products. It is considered one of the largest suppliers to convenience stores nationwide. **www.mclaneco.com**
ASSOCIATED WHOLESALE GROCERS 5000 KANSAS AVE KANSAS CITY, KS 66106 Telephone: (913) 2881000 Fax: (913) 2881508 Details: One of the largest retailer owned cooperatives with more than 1300 member stores that cover 21 states. These locations are under the various banners of ALPS, Apple Markets, Cashsaver, Country Mart, Price Chopper, Sunfresh and Thriftway. **www.awginc.com**	MCLANE/FOODSERVICE INC. 2085 MIDWAY RD. CARROLLTON, TX 75006 Telephone: (972) 3642000 Fax: (972) 3642088 Details: Major food supplier to a number of popular restaurant chains.
CAPITOL CITY PRODUCE CO, INC 16550 COMMERCIAL AVE. BATON ROUGE, LA 70816 Telephone: (225) 2728153 Fax: (225) 2728152 Details: Fresh fruit and vegetable supplier to a number of South Louisiana food service and retail operations. **www.capitolcityproduce.com**	MCLANE/MIDWEST 3400 E. MAIN ST. DANVILLE, I 61832 Telephone: (217) 4771500 Fax: (217) 4777513 Details: Wholesale distributor
ECONOMY CASH & CARRY INC 1000 E OVERLAND AVE EL PASO, TX 79901 Telephone: (915) 5322660 or sales department: (915) Details: Grocery wholesaler for the Southwest region as well as Mexico.	MCLANE/SOUTHERN CALIFORNIA 4742 GEORGIO BLVD. SAN BERNARDO, CA 92407 Telephone: (909) 8877500 Fax: (909) 8872421 Details: Wholesale distributor
EVCO WHOLESALE FOOD 309 MERCHANT ST EMPORIA, KS 66801 Telephone: 18002793826 Fax: (620) 3436375 Details: Independent foodservice distribution company. **www.evcofoods.com**	MCLANE/SOUTHERN 2104 MANUFACTURERS BLVD. NE. BROOKHAVEN, MS, 39602 Telephone: (601) 8336761 Fax: (601) 8354346 Details: Wholesale distributor
F & E FOODSERVICE P.O. BOX 2080 WICHITA, KS 67201 Telephone: (316) 8382400 Fax: (316) 8385942	MCLANE/SUNWEST, INC. 14149 MCDOWELL ROAD GOODYEAR, AZ 85338 Telephone: (623) 9357500 Fax: (623) 9357085

Details: Foodservice distributor **www.fefs.com**	Details: Wholesale distributor
FORREST CITY GROCERY CO 3400 COMMERCE RD FORREST CITY, AR 72335 Telephone: (870) 6332044 Fax: (870) 6335234 Details: distributes grocery items to convenience stores and supermarkets in the Arkansas area and in some of Tennessee and Mississippi.	RICO'S PRODUCTS CO. INC 621 S. FLORES SAN ANTONIO, TX 78204 Telephone: (210) 2221415 Fax: (210) 2266453 Details: Supplier of nacho cheese, chips, salsa and other related products to the concession food industry. **www.ricos.com**
GRUMA CORP. 1159 COTTONWOOD LN. STE. 200 IRVING, TX 75038 Telephone: (972) 232-5000 Fax: (972) 2325176 Details: Manufactures and distributes corn flour, tortillas and related food products throughout the US.	SCHRAAD & ASSOCIATES INC 5125 N SANTA FE AVE OKLAHOMA CITY, OK 73118 Telephone: (405) 5283327 Fax: (405) 5570622 Details: Food brokers
GSC ENTERPRISES, INC 130 HILLCREST DR S SULPHUR SPRINGS, TX 75482 Telephone: (903) 8850829 Fax: (903) 8856928 Details: Wholesale distributor that supplies independently owned convenience stores, grocer and discounters in the Southwest, Southeast and the Midwest. **www.grocerysupply.com**	SCRIVNER INC 5701 N SHARTEL AVE OKLAHOMA CITY, OK 73129-7397 Telephone: (405) 8415500 Details: Distribution warehouse
HALE-HALSELL COMPANY 9111 E PINE ST TULSA, OK 74115 Telephone: (918) 8354484 Fax: (918) 6415471 Details: Wholesale and retail sale of food items throughout Arkansas, Missouri and Oklahoma.	SYSCO CORPORATION 1390 ENCLAVE PARKWAY HOUSTON, TX 77077-2099 Telephone: (281) 5841390 Fax: (281) 5842721 Details: Largest foodservice distributor in all of North America. **www.sysco.com**
LABATT FOOD SERVICE 4500 INDUSTRY PARK DR SAN ANTONIO, TX 78218 Telephone: (210) 6614216 Fax: (210) 6610973 Details: Responsible for two major distribution centres in San Antonio and Dallas **www.labattfood.com**	3-G FOODS CORPORATION 2940 REWARD LN DALLAS, TX 75220 Telephone: (214) 3570900 Details: WHOL DISTRIBUTORS OF FOOD & RESTAURANT. Sales: $9500000. Total Employees: 40
LOTT MARKETING INC 1328 SOUTH LOOP W STE 102 HOUSTON, TX 77054 Telephone: (713) 7999394 Fax: (713) 7901584 Details: This is a sales and marketing agency that represents a huge assortment of foods in the food service industry. **www.lottmarketing.com**	

5. Major Wholesale and Distributors Packaged Frozen Foods - Southwest US Headquarters:

ARROW-SYSCO FOOD SERVICES, 1451 RIVER OAKS RD W HARAHAN, LA 70123 Telephone: (504) 7341015 Fax: (504) 7313378 Details: Wholesaler of frozen foods.	LACASSAGNE'S, INC P.O. Box 50501 NEW ORLEANS, LA 70151-1501 Telephone: (504) 8340900 Fax: (504) 8346593 Details: Frozen foods wholesaler.
JOHN SOULES FOODS INC P.O. BOX 4579 TYLER, TX 75708 Telephone: (903) 8774080 or 18003384588 Details: A leading producer of high quality value added frozen meat products.	PON FOOD CORP P.O. Box 747 PONCHATOULA, LA 70454 Telephone: (504) 3866941 Fax: (504) 3709977 Details: Frozen and dry wholesale distributors.

6. Major Wholesalers and Distributors Poultry & Poultry Products - Southwest US Headquarters:

CAL-MAINE FOODS INC. 3320 WOODROW WILSON DRIVE JACKSON, MS 39209 Telephone: (601) 9486813 Fax: (601) 9690905 Details: The largest producer/distributor of fresh shell eggs in the US. This company sells to 28 states including those in the Southeast region. **www.calmainefoods.com**	FEATHER CREST FARMS INC HWY 21 BRYAN, TX 77808 Telephone: (979) 5892576 Fax: (979) 5893052 Details: Wholesale eggs
CHISESI BROTHERS MEAT PKG CO INC 2419 JULIA ST NEW ORLEANS, LA 70119 Telephone: (504) 8223550 Fax: (504) 8223916 Details: Wholesale poultry and meat packing plant.	J W RENEAU POULTRY & EGGS 1405 N CAMP ST SEGUIN, TX 78155 Telephone: (803) 3034453 Details: Wholesale poultry, fresh meat, eggs, cheese, seafood and frozen foods.
COUNTRY SQUIRE FARM PRODUCTS TOM BEAN, TX 75489 Telephone: (903) 3642365 Details: Wholesale fresh poultry.	

7. Major Wholesale and Distributors Confectionery Products - Southwest US Headquarters:

RICOS PRODUCTS CO. INC 621 S FLORES ST. AN ANTONIO, TX 78204 Telephone: (210) 2221415 Fax: (210) 2266453 Details: Wholesale concession food and	T-BAR BROKERAGE INC 530 SW 14TH ST GRAND PRAIRIE, TX 75051 Telephone: (214) 6306931 Details: Foodservice supplier and foodservice

related equipment. **www.ricos.com**	vendor.
SAN SABA PECAN 2301 S. MAIN STREET LAS CRUCES, NM 88005 Telephone: (505) 5265745 Fax: (505) 5262794 Details: Wholesale and retail pecans. **www.sansabapecan.com**	

8. Major Wholesale and Distributors Fish & Seafood's - Southwest US Headquarters:

DAVE SAGER'S SEAFOOD PLUS 4802 BRIDAL WREATH DR RICHMOND, TX 77469 Telephone: (713) 3428833 Details: Wholesales fresh and frozen seafood.	LIBERTY SEAFOOD CO INC 7TH WHARF PIER 7 GALVESTON, TX 77550 Telephone: (409) 7628661
FARMER BOYS CATFISH KTICHEN 5192 FANNETT RD BEAUMONT, TX 77705-6006 Telephone: (409) 8426902 Details: Wholesale seafood and seafood restaurants.	TUNA FRESH INC 1501 WHITNEY AVE. GRETNA, LA 70056 Telephone: (504) 3981012 Fax: (504) 3981024 **www.seafoodwarehouse.com**
LANDLOCK SEAFOOD CO INC 1815 TRINITY VALLEY DR CARROLLTON, TX 75006 Telephone: (972) 2417500 Details: One of the largest processors and wholesale distributors of fresh and frozen seafood in the Southwest US.	PAUL PIAZZA & SON INC 1552 SAINT LOUIS ST NEW ORLEANS, LA 70152 Telephone: (504) 5246011 Details: Wholesale of fresh fish and seafood's.

9. Major Wholesale and Distributors Meats & Meat Products - Southwest US Headquarters:

LEONARD & HARRAL PACKING CO. 647 STEVES AVE SAN ANTONIO, TX 78210 Telephone: (210) 5323241 Details: Meat and meat product merchant wholesalers.	PREFCO CORP 5122 ASHBROOK DR HOUSTON, TX 77024-8092 Telephone: (713) 8800880 Fax: (713) 8801019 Details: Wholesale distributor of fresh meats. **www.atlanticpremiumbrands.com**
LONE STAR FOODSERVICE CO 1403 E 6TH ST AUSTIN, TX 78702 3303 Telephone: (512) 4783161 Fax: (512) 4783131 Details: high quality high volume control steak producer. **www.lonestarfood.com**	QUICK-SERV MEATS INC 2480 S 4th St. BEAUMONT, TX 77701 Telephone: (409) 8322636 Details: Wholesale meats.

10. Major Wholesale and Distributors Fresh Fruits & Vegetables - Southwest US Headquarters:

CAVAZOS CANDY PRODUCE & GR WHL 2805 SAN BERNARDO AVE LAREDO, TX 78040 Telephone: (210) 7224523 Details: Wholesale vegetables and fruits.	SCARMARDO FOODS 1289 N. HARVEY MITCHELL PKWY BRYAN, TX 77803 Telephone: (979) 7797209 Fax: (979) 8221763 Details: Wholesale fruits and vegetables and frozen foods and retail fruit. **www.scarmadofoods.com**
FARMERS MARKET FORT WORTH INC 5507 E BELKNAP ST FORT WORTH, TX 76117 Telephone: (817) 8388526 Details: Wholesale retailer and processor of fresh fruit and vegetables	H.C. SCHMIEDING PRODUCE 2330 N. THOMPSON ST SPRINGDALE, AR 72764 Telephone: (479) 7510515 Fax: (479) 7516831 Details: Wholesale distributor of fresh fruits and vegetables.
FRESHPOINT INC 1390 ENCLAVE PARKWAY HOUSTON TX, 77077-2099 Telephone: (281) 8994242 Fax: (281) 8994231 Details: Wholesales fresh fruit and vegetables, owns approximately 20 distribution centres throughout North America. **www.freshpoint.com**	SCHOENMANN PRODUCE COMPANY INC. 3173 PRODUCE ROW HOUSTON, TX 77061 Telephone: (713) 9232728 Details: Wholesale of fresh fruits and vegetables.
H C SCHMIEDING PRODUCE CO 2330 N THOMPSON ST. SPRINGDALE AR 72764 Telephone: (479) 7510515 Fax: (479) 7516831 Details: Wholesale distributor of fresh fruits and vegetables.	STANDARD FRUIT & VEGETABLE CO. INC 1400 PARKER ST DALLAS, TX 75215 Telephone: (214) 4283600 Fax: (214) 4219502 Details: Wholesale of fresh fruits and vegetables
BEN E KEITH COMPANY 601 E 7th STREET FORT WORTH, TX 76102-5501 Telephone: (817) 8775700 Fax: (817) 3381701 Details: This firm delivers a full line of foods to more than 12 000 customers in 10 states.	SUN VALLEY FRUIT COMPANY, INC 7110 2ND ST NW ALBUQUERQUE, NM 87125-0707 Telephone: (505) 3455767 Fax: (505) 3457563 Details: Wholesale fresh and frozen fruits and vegetables.
KMB PRODUCE, INC 1142 AVENUE S GRAND PRAIRIE, TX 75050 Telephone: (972) 9888553 Details: Canned fruits and vegetables	UNIMARK GROUP INC 1425 GREENWAY DRIVE, STE 160 IRVING, TX 75038 Telephone: (972) 5181155 Fax: (972) 5181405 Details: Wholesale of fruits through two subsidiaries.
LONDON FRUIT INC 9010 S CAGE BLVD PHARR, TX 78577 Telephone: (210) 7817799 Fax: (210) 7812323 Details: Distributors of fresh produce. **www.londonfruit.com**	

11. Major Wholesale and Distributors Beer & Ale - Southwest US Headquarters:

ANHEUSER-BUSCH SALES OF TULSA 2929 N FLORENCE AVE TULSA, OK 74110 Telephone: (918) 8368760 Fax: (918) 8318762 Details: Wholesale beer/ale **www.abwholesaler.com**	LARCO DISTRIBUTING INC 151 N MAIN ST STE 1000 WICHITA, KS 67205 Telephone: (316) 7222592 Details: Wholesale beer
BEN E KEITH COMPANY 601 E 7TH ST FORT WORTH, TX 76102-5501 Telephone: (817) 8775700 Fax: (817) 3381701 Details: Wholesale beer and grocery items. They deliver beer in 50 Texas counties. **www.beneketih.com**	MILLER DISTRG FORT WORTH, TX 76102 Telephone: (817) 8775960 Details: Wholesale beer
BROWN DISTRIBUTING CO 8711 JOHNNY MORRIS ROAD AUSTIN, TX 78734 Telephone: (512) 4789353 Fax: (512) 4780801 Details: Wholesale supplier of imports **www.browndistributing.com**	NEW MEXICO BEVERAGE CO 701 COMANCHE RD NE ALBUQUERQUE, NM 87107 Telephone: (505) 3458761 Details: Beer wholesaler
CC CLARK INC 501 ACADEMY ROAD STARVILLE MS, 39759-4047 Telephone: (662) 3234317 Fax: (662) 3236461 Details: Holding company for beverage distributors serving Kentucky, Louisiana and Mississippi.	OLEY DISTRIBUTING CO INC 920 N MAIN ST FORT WORTH, TX 76106-9421 Telephone: (817) 6258251 Fax: (817) 6267269 Details: Beer wholesaler
DEL PAPA DISTRIBUTING CO INC 2000 LOOP 197 N TEXAS CITY, TX 77590 Telephone: (409) 9458080 or 18884335727 Details: Anheuser-Busch Wholesaler	PREMIUM BEERS OF OKLAHOMA, LLC 1700 BEECHWOOD AVE. OKLAHOMA CITY OK, 73149-5801 Telephone: (405) 6192600 Fax: (405) 6192690 Details: Wholesale beer distributors to central and south central Oklahoma.
DESERT EAGLE DISTRIBUTING COMPANY 6949 MARKET AVE EL PASO, TX 79915 Telephone: (915) 7724246 Details: Beer distributor	SILVER EAGLE DISTRIBUTORS, L.P 1301 WHITE ST HOUSTON, TX 77007 Telephone: (713) 8694361 Fax: (713) 8678112 Details: Leading beer wholesaler in the US, they are planning on expanding their facilities to keep up with sales. **www.silvereaglebud.com**
EAGLE DISTRG OF SHREVEPORT 900 W 62ND ST SHREVEPORT, LA 71106 Telephone: (318) 8682708 Details: Wholesale beer	THE GAMBRINUS CO 14800 SAN PEDRO AVE SAN ANTONIO, TX 78232-3733 Telephone: (210) 4909128 Fax: (210) 4909984 Details: Brews and distributes beer **www.gambrinusco.com**
HARBOR DISTRIBUTING HOLDG CO	UNITED BEVERAGE COMPANY

1515 E 4TH ST LITTLE ROCK, AR 72202 Telephone: (501) 3720185 Details: Wholesale beer	624 N 44th AVE Phoenix AZ, Telephone: (602) 2331900 Fax: (602) 3536792 Details: Beverage distributors **www.ubcaz.com**
JOE G MALOOF & CO 701 COMANCHE RD., NE ALBUQUERQUE NM, 87107 Telephone: (505) 2432293 Fax: (505) 7681552 Details: Wholesale beer and liquor distributor	

12. Major Wholesale and Distributors Wine & Distilled Alcoholic Beverages - Southwest US Headquarters:

BOLOGNA BROTHERS 1876 SORREL AVE BATON ROUGE, LA 70802 Telephone: (504) 3439551 Details: Wholesale liquor and wines.	MAGNOLIA LIQUOR LAFAYETTE INC. 209 LUCILLE AVE LAFAYETTE, LA 70502 Telephone: (318) 2611870 Details: Wholesale liquors, wine and beer.
DAVE AND BUSTER'S INC 2481 MANANA DRIVE DALLAS, TX 75220 Telephone: (214) 3579588 Fax: (214) 3500941 Details: Operates chain of 30 entertainment complexes in 18 states. **www.daveandbusters.com**	MOON DISTRIBUTORS INC 2800 VANCE ST LITTLE ROCK, AR 72206 Telephone: (501) 3758291 Fax: (501) 375) 7035 Details: Wholesale liquor and wine. **www.moondist.com**
FAMOUS BRANDS DISTRIBUTORS, 2910 SW TOPEKA BLVD TOPEKA, KS 66611 Telephone: (913) 2676622 Details: Wholesale liquor	REPUBLIC BEVERAGE COMPANY 8045 NORTHCOURT RD. HOUSTON TX, 77040-4392 Telephone: (832) 7821000 Fax: (832) 7821010 Details: Texas wholesaler of wines and spirits. Together with 5 subsidiaries they distribute 90% of wine and spirits sold in Texas. **www.republicbeverage.com**
GLAZER WHL DRUG COMPANY INC. 14911 QUORUM DRIVE DALLAS TX, 75254 Telephone: (972) 3928200 Fax: (972) 7028508 Details: Wholesale distributor of alcoholic beverages; also, the largest company of its kind in Texas, and one of the largest wine and spirits distributors in the US. **www.glazers.com**	RICHARD DISTRIBUTING COMPANY 1601 COMMERCIAL ST NE ALBUQUERQUE, NM 87102-0157 Telephone: (505) 2474186 Fax: (505) 243-2438 Details: Wholesale wine and liquor.
LAREDO DUTY FREE INC 801 LINCOLN ST. LAREDO, TX 78040 Telephone: (956) 7225700 Details: Wholesale wine, distilled beverages, tobacco products etc.	TERK DISTRIBUTING COMPANY INC 6906 COMMERCE AVE AMARILLO, TX 79120 Telephone: (806) 3764183 Fax: (806) 3761401 Details: Wholesale liquor and wine.

G. Distribution and Product Exposure

1. Details on Distributors:

The Distributors Responsibilities:

In this total system, an independent limited line specialty distributor adds a special skill and knowledge. It is a distributor's knowledge of product and product handling related to specialty categories coupled with their willingness to serve what it sells that places the distributor in a unique and valuable position. A products success is often dependent on how well and how effectively it is exposed to the market. A successful distributor and sales force has the ability to fulfill these requirements and, as a result has the ability to determine, to a large extent, how successful a firm and its products will be.

Who is the Distributor?

Characteristics of a distributor:

- Warehouses products that are for sale
- Buys products from a manufacturer or broker
- Distributes products to food retailers, foodservices operations and institutions
- Sells food products wholesale

In order to answer the question: "Who is the distributor?" it may be easier to say who is not!

It is not a food broker. They both are independent agents. The main responsibility of the broker lies in selling products for the grocery manufacturing industry and then passing the orders on to the manufacturer for the manufacturer's further disposition.

Another important difference is the fact that the distributor takes title to the manufacturer's product while the broker does not. This is an important consideration since the distributor can offer special discounts, handle spoils and damaged product, extend credit, and, in fact, guarantee sales of the manufacturer's product.

What Products Do Distributors Sell?

Limited line specialty food distributors may carry a variety of product offerings. They may specialize in one or several or all of these:

Specialty/Gourmet
Chips, Snacks, Cookies, Crackers
Health, Diet, Dietetic, Natural
Candy
Kosher, Italian, Hispanic, Oriental, etc.
Refrigerated/Frozen
Non-Foods (HBC, GM, PET, etc.)
Foodservice, Institutional, Non-Retail

Distributors differ from retailer owned and full-line wholesaler warehouses in product offerings, frequency due to product characteristics:

Special selling requirements/skills
Low volume
Less than case lots
Fragility
Partial cases
Unique to select stores within a chain
Perishable tendencies

What Distributors Really Sell?

- **Service:**

It is the service merchandising orientation (along with the specialty nature of the products) which makes the distributor unique. The distributor must be able to offer and provide, and usually is providing numerous services to the manufacturer, retailer and the consumer.

2. Test Market Your Product

1. To determine if you should come into a market slowly, or blast in.
2. Determine acceptability of:

    price
    package
    quality
    in-store placement(s)

3. Test market your introductory program(s) - which way is best.
4. Test market your follow-up and ongoing programs.
5. Determine regional, local, neighbourhood acceptance.
6. Learn local retailer and customer preferences and practices.
7. Learn about regional/seasonal migrations and work with them or around them.
8. Know what it takes to do business in that market.

An IRI study concluded that manufacturers can reduce failure rates by test marketing; pre-tested products have a success rate of 56%, whereas untested items fail 80%-90% of the time. Besides test marketing, the following factors are often the main reasons as to why products fail in new markets:

- No competitive Point of Difference
- Lack of Ideal Positioning
- Lack of Strategic Direction
- Lack of Marketing Support
- Price/Value Relationship
- Product/Did Not Deliver On Promise
- Lack of Creative Differentiation
- Lack of Management Commitment

- Ineffective Advertising

Often times, market testing can pinpoint or help to uncover areas that may lack in your approach to a new market. After testing you are given a second chance to adjust your approach, whereas – when you jump in to a market full blast, you often eliminate your chance to “try again”. Market testing does not guarantee success, but it does promise to reduce the risk of failure.

3. Product Programs/Trade Promotions

1. Free goods

- one free case per store (provable that it went to the store) based on bulk purchses
- one free with every 100 pieces purchased (for example – when dealing with smaller numbers)
- free floor displays or eye attracting on the spot eye catchers.

2. Participate in store/section/re-sets.
3. In-store demonstrations -- if your product is conducive to demonstration.
4. Sales person incentives.
5. "Bounty" for each store placement.
6. Advertising allowances for mention in ad.
7. In-store promotional material

- floor display
- shelf talkers
- signs/posters
- coupons

8. Introductory trade allowance of X% or X cents per case purchased.
9. Coupons

- in-store demo
- in-store at shelf
- in best food day newspaper/ad
- free standing insert (FSI)
- in-store flyer

10. Newspaper ads

- supplier
- retailer
- distributor
- co-op

11. Radio/TV spots.
12. Price reduction (don't confuse the retailer or consumer with "real" price).
13. Discretionary funds for distributor/buyer/merchandiser use.

4. Proof of Performance

It is most important to create deal efforts which are measurable and provable. Merchandise is a better incentive to sell than is money.

- Prepare a cover letter showing the purpose of the program
- Require proof of performance
- copy of ad
- retailer internal authorization form
- bill back
- signed contracts
- sales data

What should be in a Product "program"?

1. Descriptive literature on why your product is unique.

2. Introductory offer to retailers.

3. Opening support:

- what will move it off the shelf, not just put it on
- what will create pull for distributors

4. The most difficult task is getting an item into the store; ongoing support is easier than opening support.

5. Seasonality of program is important. There is always a holiday season or special event that retailers tie into. These help generate traffic. Tie your programs to these.

5. Keep All Doors Open

Nobody knows what's going to happen tomorrow. Talk to everyone as if you might do business together.

1. Suppliers change distributors

2. Distributors add and drop lines

3. Retailers change distributors

4. Mergers, acquisitions, failures and all the other activity will create new relationships and business partners

5. New territories will open up

Keep pursuing who and what you want - it may come to you.

6. What Retailers Want

New product launches - Appearance is one of the key factors retail buyers use to assess new items. Sampling is another. Retailers also like demos and want to know what kind of advertising support will be provided.

Shelf space – Food producers will have an easier sell if retailers have shelf space available. Innovative displays can help alleviate the problem.

Slotting fees - Retailers like them.

Net/net pricing - Very important in some retail formats, particularly membership clubs.

Cash discounts - Under increasing pressure to boost corporate profits, retailers are prone to "jump on items" offering terms of 2% net 30 days. Producers who offer this incentive will find it often opens retailer's doors.

Accruals and special discounts - If competitors offer retailers such incentives, it would be wise to follow suit.

Good service - Vital to any manufacturer/retailer relationship. Retailers want to know how well their stores will be serviced and if manufacturers will be there when needed.

Quality - Retailers want quality products and services from quality organizations, staffed by quality personnel.

Category profit contribution - Retailers want all the 25% and 30% margin items they can get.

Private label - Retailers are protective of private label lines.

Sales preparation - Retailers expect food makers to know their particular market/market niche.

Everyday Low Price (ELP) - If a potential buyer wants it, one should consider customizing to meet the retailer's need. Club store opportunities exist for manufacturers who offer incentives such as net/net pricing and palletizing programs.

H. Additional Contacts

There are a number of worthy contacts which can bring a level of expertise which Canadian food processors and manufacturers can utilize regarding the Southwest Food and Beverage Industry. There are numerous Trade/Professional organizations, ways in which to access these organizations are detailed in the "Sources of Industry Information" section of this report., Federal and State Commerce Departments, magazines – newspapers and industry publications, studies and reports should all be utilized in the market information gathering stage as well as in the planning and implementation of marketing and sales efforts.

Listed below are various contacts that could be accessed for more in-depth information regarding the industry; consider these contacts a small section of a vast amount of potential sources of information and insight. It is up to the Canadian Exporter to search out and utilize as many sources as possible, in an effort to assemble a comprehensive and detailed perspective on the industry and the area.

Kansas

Kansas Department of Agriculture 109 SW 9th Ave. Topeka, KS 66612 Telephone: (785) 2963556 **www.ksda.gov**	Kansas Retail Grocers Association 2809 W 47th Street Shawnee Mission, KS 66205-1697 Telephone: (913) 3843830
Kansas Restaurant and Hospitality Association 3500 N. Rock Road Building 1300 Wichita, KS 67226 Telephone: (316) 2678383 **www.krha.org**	

Oklahoma

Oklahoma Department of Agriculture, Food and Forestry 2800 N Lincoln Blvd. Oklahoma City, OK 73105-4298 Telephone: (405) 5213864 **www.oda.state.ok.us**	Oklahoma Restaurant Association 3800 North Portland Avenue Oklahoma City, OK 73112 Telephone: 800 3758181 or (405) 9438181 **www.okrestaurants.com**
Oklahoma Grocers Association 25 NE 52nd Street P.O. Box 18716 Oklahoma City, OK 73154 Telephone: (405) 5259419 **www.okgrocers.com**	

New Mexico

New Mexico Department of Agriculture MSC 3189 Box 30005 Las Cruces, NM 88003-8005 Telephone: (505) 6463007 **http://nmdaweb.nmsu.edu**	New Mexico Restaurant Association 9201 Montgomery NE Suite 602 Albuquerque, NM 87111 Telephone : (505) 3439848 or 800 4320740 **www.nmrestaurants.org**
New Mexico Economic Development Department 1100 St Francis Drive Suite 1060 Santa Fe NM 87505 Telephone: (505) 8270300 **http://www.edd.state.nm.us/**	New Mexico Grocers Association 4010 Carlisle Blvd. NE Ste. A Alburquerque NM 87107-4532 Telephone: (505) 8881812

Texas

Texas Department of Agriculture	Texas Restaurant Association

1700 North Congress Ave. Stephen F Austin Building, 11th floor Austin, TX 70701 Mailing Address: P.O. Box 12847 Austin, TX 78711 Telephone: (512) 4637476 **www.agr.state.tx.us/**	P.O. Box 1429 Austin, TX 78767-1429 Telephone: 800 3952872 or (512) 4574100 **www.restaurantville.com**
Texas Aquaculture Association P.O. Box 10584 Colleges Station, TX 77842 Telephone: (979) 6952040 **www.texasaquaculture.org**	Texas Grocery and Convenience Association 7719 Wood Hollow Drive Ste. 150 Austin, TX 78731 Telephone: 800 8568342 or (512) 9269285 **www.txgca.org**

Louisiana

Louisiana Department of Agriculture and Forestry Marketing Dept. Suite 1153 P.O. Box 3334 Baton Rouge, LA 70821-3334 Telephone: (225) 9221277 **www.idaf.state.la.us/**	Louisiana Restaurant Association 2700 N. Amoult Road Metaine, LA 70002 Telephone: (504) 4542277 **www.lra.org**

Arkansas

Arkansas Development Finance Authority 423 Main Street Suite 500 P.O. Box 8023 Little Rock AR 72203-8023 Ted McNulty – VP Agriculture Telephone: (501) 6825849 **www.state.ar.us/adfa**	Arkansas Hospitality Association 603 S. Pulsaki P.O. Box 3866 Little Rock, AR 72203 Telephone: (501) 3762323 **www.arhospitality.org**

National

National Poultry and Food Distributors Association 958 McEver Road Ext., Unit B-8 Gainesville, GA 30504 Telephone: 877 8451545 or (770) 535 9901 **http://www.npfda.org/**	

Publications

Progressive Grocer 770 Broadway New York, NY 10003 Telephone: subscriber services (847) 763 9050 **www.progressivegrocer.com**	Gourmet News P.O. Box 1056, 106 Lafayette Street Yarmouth, ME 04096 Telephone: (207) 846-0600 **www.gourmetnews.com**
Fancy Food Magazine 12th Floor Chicago, IL 60610 Telephone: (312) 849 2220 **www.fancyfoodmagazine.com**	The Gourmet Retailer 3301 Ponce de Leon Blvd. Suite 300 Coral Gables, FL 33134 **www.gourmetretailer.com**

I. Review of Regulatory Issues

There are a multitude of regulatory bodies and guidelines that should be adhered to when planning on exporting food products into the US For a detailed look at these organizations, as well as a breakdown of guidelines to follow, explore the "Market Information", "Market Access" section for the United States.

This particular section on the ATS website intends to help Canadian Exporters build their business beyond Canada. The Market Access section is meant to stimulate export planning and preparedness. This section will not only answer questions, but also prompt you to ask more; the more information and answers you gather, the stronger the likelihood for successful exporting.

Visit: **http://www.ats.agr.gc.ca/us/access_us_e.htm**

J. Sources of Industry Information

For a comprehensive compilation of Industry information please visit the

US FOOD INDUSTRY RESOURCE DIRECTORY
Third Edition: June, 2005 Available on the ATS website

This directory features the contact information and websites of key industry associations to consult and use as resources in your exporting endeavour.

Visit: http://ats.agr.ca/us/4032_e.htm

K. Selected Manufacturers/Processors Located in the Southwest United States

ABTEX BEVERAGE CORPORATION 650 Colonial Dr Abilene, TX 79603 Telephone: (915) 6737171 Details: MFG CANNED SOFT DRINKS & WATER.	LAND OPINES 500 Abney Ave Lufkin, TX 75904 Telephone: (936) 6345537 Details: MILK PROCESSOR & RET GROCERIES.
ADAMS EXTRACT AND SPICE 180 Johnson St Gonzales, TX 78629 Telephone: (830) 6721850 Details: MFG FOOD FLAVORING EXTRACTS & FOOD COLORINGS & SPICES.	LOUISIANA COCA-COLA BTLG LTD 1050 S Jefferson Davis Pk New Orleans, LA 70125 Telephone: (504) 8222400 Details: MFG BOTTLED & CANNED SOFT DRINKS & VENDING MACHINE SERVICE.
A D M MILLING CO. 8000 W 110th St Ste 220 Shawnee Mission, KS 66210 Telephone: (913) 4919400	LOVE BOTTLING CO 2000 W Peak Blvd Muskogee, OK 74401 Telephone: (918) 6823434

Details: AGRICULTURAL PROCESSOR	Details: BOTTLES SOFT DRINKS.
ADVANCE FOOD COMPANY, INC 301 W Broadway Enid, OK 73701 Telephone: (888) 7238237 Details: MFG COOKED & PROCESSED MEATS FROM PURCHASED MEATS.	M A PATOUT & SON LIMITED 3512 J Patout Burns Rd Jeanerette, LA 70544 Telephone: (337) 2764592 Details: MANUFACTURES RAW SUGAR MOLASSES & SYRUP.
ALAN RITCHEY INC 740 S I-35 E Frontage Rd Valley View, TX 76272 Telephone: (940) 7263276 Details: MFG FEED CONTRACT HAULERS & GRAIN ELEVATORS.	MANDA PACKING CO., INC. 2445 Sorrel Ave Baton Rouge, LA 70802 Telephone: (504) 3447636 Details: MFG SAUSAGES & OTHER PREPARED MEAT PRODUCTS.
ALL AMERICAN BOTTLING COMPANY, INC 15 N Robinson Ave Ste 1201 Oklahoma City, OK 73102 Telephone: (405) 2321158 Details: BOTTLES & DISTRIBUTES SOFT DRINKS.	MC ILHENNY COMPANY Hwy 329 Avery Island, LA 70513 Telephone: (337) 3658173 Details: MANUFACTURES SEASONINGS & SAUCES.
ALLEN CANNING COMPANY 305 E. Main St. Siloam Springs, AR 72761-3232 Telephone: (479) 5246431 Details: VEGETABLE CANNING	MCLANE FOODS, INC 4747 Mclane Pky Temple, TX 76504 Telephone: (254) 7717500 Details: MFG SANDWICHES BAKED GOODS & BURRITOS.
AMERICANA FOODS 3333 Dan Morton Drive Dallas, TX 75236 Telephone: (800) 4568229 Details: MFG ICE CREAM/FROZEN DESERT	MC SHARES INC 1835 E North St Salina, KS 67401 Telephone: (785) 8252181 Details: MFG FLOURS WHOL GRAIN FUMIGANTS MFG AGRICULTURAL PEROXIDES
AMERICAN PRODUCTS COMPANY 10741 Miller Rd Dallas, TX 75238 Telephone: (214) 3420820 Details: MFG FRUIT-BASED FILLINGS & TOPPINGS ICING BAKERY DOUGH CAKES COOKIES & BROWNIES & WHOL BAKER'S SUPPLIES.	MELINDAS GOURMET FOOD PRODUCTS 992 Industry Rd Kenner, LA 70062 Telephone: (504) 8310037 Details: MFG DRY MIX SEASONINGS & SPICES.
AMERICAN RICE INC 10700 North Freeway, Suite 800 Houston, TX 77037 Telephone: (281) 2728800 Details: RICE MILLING & OLIVE PRODUCTION	MEYER'S BAKERIES, INC. Highway 67 East Hope, AR 71801 Telephone: (870) 7779031 Details: MANUFACTURES BREAD ROLLS & MUFFINS
AMERICAN SUPERIOR FEEDS, INC 100 Mill St SE Ardmore, OK 73401 Telephone: (405) 2265380 Details: MFG LIVESTOCK FEED.	MGP INGREDIENTS 1300 Main St Atchison, KS 66002 Telephone: (913) 3671480 Details: MFG ALCOHOLIC LIQUORS & WHEAT GLUTEN
AUSTIN COCA-COLA BOTTLING CO 6011 Lemmon Ave Dallas, TX 75209 Telephone: (214) 3571781 Details: BOTTLES & DISTRIBUTES SOFT	MOUNTAIN VALLEY SPRING CO. 150 Central Ave Hot Springs National Park, AR 71901 Telephone: (501) 6241635 Details: BOTTLES NATURAL SPRING WATER

DRINKS.	
BAMA COMPANIES INC 2745 E 11th St Tulsa, OK 74104 Telephone: (918) 7322000 Details: MFG BAKERY PRODUCTS & OVER-THE-ROAD TRUCKING.	MOUNTAIRE CORPORATION 204 E 4th St Little Rock, AR 72202 Telephone: (501) 3726524 Details: FULLY INTEGRATED POULTRY PROCESSOR
STILLWATER MILLING COMPANY 512 E 6th Ave Stillwater, OK 74074 Telephone: (405) 3723445 Details: MFG LIVESTOCK FEED & RET FEED & FARM SUPPLIES.	MOUNTAIRE FARMS OF DELMARVA Selbyville, DE 19944 Telephone: (302) 4368241 Details: POULTRY PROCESSOR
BAUMER FOODS INC 4301 Tulane Ave 17 New Orleans, LA 70119 Telephone: (504) 4825761 Details: MFR JAMS JELLIES PRESERVES APPLE BUTTER ORANGE MARMALADE & BARBECUE SAUCE WORCESTERSHIRE HOT SAUCE PEPPERS & MUSTARD	MRS BAIRDS BAKERIES INC 7301 South Fwy Fort Worth, TX 76134 Telephone: (817) 6153000 Details: MFG BREAD & CAKES.
BEST MAID PRODUCTS 1401 S Riverside Dr Fort Worth, TX 76104 Telephone: (817) 3355494 Details: MFG PICKLES SALAD DRESSINGS & MAYONNAISE.	MRS CROCKETT'S KITCHENS, INC 8821 Forum Way Fort Worth, TX 76140 Telephone: (817) 2938164 Details: MFG REFRIGERATED FOOD SPECIALTIES & SANDWICH SPREADS.
BETTER BEVERAGES INC 1415 Hwy 90a E Hallettsville, TX 77964 Telephone: (361) 7983651 Details: MFG BOTTLED/CANNED SOFT DRINKS.	NACOGDOCHES COCA COLA BTLG CO 3321 NW Stallings Dr Nacogdoches, TX 75964 Telephone: (936) 5640268 Details: MFG SOFT DRINK.
BIAD CHILI LTD COMPANY 6060 Hwy 478, S Main St Mesilla Park, NM 88047 Telephone: (505) 5250034 Details: CHILI PROCESSING.	NATIONAL BEEF PACKING CO LLC 1501 W 8th St Liberal, KS 67901 Telephone: (620) 6241851 Details: SLAUGHTERING & PROCESSING OF MEAT
BRUCE FOODS CORPORATION 5802 Coteau Rd New Iberia, LA 70560 Telephone: (337) 3645874 Details: MFR MEXICAN FOODS VEGETABLE CANNING SAUCES & SEASONINGS	O. K. FOODS INC. PO Box 1787 Fort Smith, AR 72902 Telephone: (800) 6359441 Details: POULTRY PROCESSING SLAUGHTERING AND DRESSING
BUNNY BREAD, INC 5646 Lewis Rd New Orleans, LA 70126 Telephone: (504) 2411206 Details: MFG BAKERY PRODUCTS	O. K. INDUSTRIES, INC. 4601 North 6th St. Fort Smith, AR 72904 Telephone: (479) 7834186 Details: MFG POULTRY FEED POULTRY PROCESSOR & RAISING
CAIN'S SUPERIOR COFFEE 37 Northeast 31st St Oklahoma City, OK 73105 Telephone: (405) 7517221 Details: MFG COFFEE & PROCESSES TEA SPICES & CONDIMENTS.	ONETA COMPANY 1401 S Padre Island Dr Corpus Christi, TX 78416 Telephone: (361) 8530123 Details: BOTTLER OF PEPSI COLA PRODUCTS & WHOL PURIFIED WATER.
CALDWELL MILLING CO INC	OWENS COUNTRY SAUSAGE, INC

504 Highway 5 Rose Bud, AR 72137 Telephone: (501) 5565227 Details: FEED MILL CHICKEN FARM AND EGG PLANT	1403 E Lookout Dr Richardson, TX 75082 Telephone: (800) 9669367 Details: MFG SAUSAGE AND RELATED MEAT PRODUCTS.
C H GUENTHER & SONS INC 129 E Guenther San Antonio, TX 78204 Telephone: (210) 2271401 Details: MILLS FLOUR & MFG CORNBREAD BISCUIT MIXES & BAKERY PRODUCTS.	PEPPER SOURCE LTD 2709 Division St Metairie, LA 70002 Telephone: (504) 8853223 Details: MANUFACTURES SAUCES AND CONDIMENTS.
CHISESI BROTHERS MEAT PACKING CO 2419 Julia St New Orleans, LA 70119 Telephone: (504) 8223550 Details: MEAT PACKING PLANTS	PEPSI-COLA BOTTLING CO OF SALINA 604 N 9th St Salina, KS 67401 Telephone: (785) 8277297 Details: BOTTLES SOFT DRINKS
CLEMENTS FOODS CO 6601 N Harvey Oklahoma City, OK 73113 Telephone: (405) 8423308 Details: MFG JELLIES BARBECUE SAUCE TOMATO SAUCE PRUNE JUICE MUSTARD MAYONNAISE VINEGAR & PEANUT BUTTER.	PETITE JEAN POULTRY 9th Atlanta St Danville, AR 72833 Telephone: (479) 4954300 Details: MFG DE-BONED POULTRY PRODUCTS
COCA COLA BOTTLING CO OF NORTH TEXAS 6011 Lemmon Ave Dallas, TX 75209 Telephone: (214) 3571781 Details: MFG SOFT DRINKS.	PILGRIM'S PRIDE CORPORATION 110 S Texas St Pittsburg, TX 75686 Telephone: (903) 8551000 Details: RAISING & PROCESSING CHICKENS EGG PRODUCTION MANUFACTURING ANIMAL FEEDS AND FARM STORES.
COCA COLA BOTTLING OF THE SOUTHWEST 1 Coca Cola Pl San Antonio, TX 78219 Telephone: (210) 2252601 Details: MFG BOTTLED & CANNED SOFT DRINKS & CARBONATED DRINKS.	PLAINS DAIRY PRODUCTS 300 N Taylor St Amarillo, TX 79107 Telephone: (806) 3740385 Details: PROCESSES MILK & MILK PRODUCTS.
COFFEE EXECUTIVE COFFEE 11 NE 11th St Oklahoma City, OK 73104 Telephone: (405) 2363932 Details: MFG & RET COFFEE TEA & COCOAS & PROVIDES COFFEE SERVICE.	PRODUCERS RICE MILL INC 518 E Harrison St Stuttgart, AR 72160 Telephone: (870) 6734444 Details: RICE MILLING & POLISHING
COMMUNITY COFFEE COMPANY INC 3332 Partridge Lane Baton Rouge, LA 70816 Telephone: (504) 2913900 Details: COFFEE ROASTING & DIRECT MARKETING/MAIL ORDERS	QUALITY PORK PROCESSORS INC 5530 Lyndon B Johnson Freeway, Ste 400 Dallas, TX 75240 Telephone: (972) 3858899 Details: PORK PROCESSING PLANT.
CONTINENTAL DELI FOODS INC 2601 NW Expressway St, Ste 1000W Oklahoma City, OK 73112 Telephone: (405) 8795506 Details: MEAT PACKING-PROCESSED PORK PRODUCTS.	QUALITY SAUSAGE 1925 Lone Star Dr Dallas, TX 75212 Telephone: (214) 6343400 Details: MFG PRE-COOKED PIZZA MEAT TOPPINGS.
CREAMLAND DAIRIES INC 10 Indian School Rd NE Albuquerque, NM 87102 Telephone: (505) 2470721	RICELAND FOODS INC 2120 S Park Ave Stuttgart, AR 72160 Telephone: (870) 6735500

Details: PROCESSES & DISTRIBUTES FLUID MILK RELATED PRODUCTS & SOUR CREAM BASED DIPS.	Details: RICE MILLING MFG EDIBLE OILS MERCHANDISES GRAIN MFG SOYBEAN MEAL AND PROCESSES SOY LECITHIN
DANISCO INGREDIENTS USA INC. Four New Century Pky New Century, KS 66031 Telephone: (913) 7648100 Details: MFG FUNCTIONAL FOOD INGREDIENTS	RIVIANA FOODS INC 2777 Allen Pky Houston, TX 77019 Telephone: (713) 5293251 Details: RICE MILLING MFG COOKIES & CRACKERS CANNED FRUIT JUICES & TOMATO PRODUCTS AND WHOLESALE FOOD PRODUCTS.
DARLING INTERNATIONAL INC 251 O Connor Ridge Blvd, Ste 300 Irving, TX 75038 Telephone: (972) 7170300 Details: GREASE & TALLOW RENDERING.	RODRIGUEZ FESTIVE FOODS INC 2901 Decatur Ave Fort Worth, TX 76106 Telephone: (817) 6263961 Details: MFG CANNED MEXICAN FOOD PREPARATIONS.
DIVERSIFIED FOOD & SEASONING INC 1012 E Harimaw Ct Metairie, LA 70001 Telephone: (504) 8340114 Details: MFR FINISHED FOOD PRODUCTS INCLUDING SEASONINGS SPICES DRY MIX SAUCES & SOUPS	SCHOTT'S SUNBEAM BAKERY 3000 Washington Ave Houston, TX 77007 Telephone: (713) 8695701 Details: MFG WHOL & RET BAKERY PRODUCTS.
DOUBLE B FOODS INC 101 W Jackson St Weimar, TX 78962 Telephone: (979) 7259444 Details: FOOD PROCESSORS OF SMOKED MEATS & SAUSAGES.	SEABOARD CORPORATION 9000 W 67th St Shawnee Mission, KS 66202 Telephone: (913) 6768800 Details: CHICKEN & PORK PRODUCTION & PROCESSING OCEAN CARGO SHIPPING COMMODITY TRADING FLOUR MILLING & BAKED GOODS PRODUCE & SHRIMP
DR. PEPPER-7-UP-RC BOTTLING CO. Hwy 412 W Paragould, AR 72450 Telephone: (870) 2368765 Details: BOTTLES & DISTRIBUTES SOFT DRINKS & WATER	SHIPLEY BAKING COMPANY 73 S 6th St Fort Smith, AR 72901 Telephone: (501) 7835174 Details: BAKERY.
DR. PEPPER DALLAS-FORT WORTH BOTTLING CO 2304 Century Center Blvd Irving, TX 75062 Telephone: (972) 5791024 Details: SOFT DRINK BOTTLING.	SHUR-VALU STAMPS INC. 12103 Interstate 30 Little Rock, AR 72209 Telephone: (501) 4556590 Details: MILK PROCESSING
EARTHGRAINS BAKING CO INC 711 S Kansas St El Paso, TX 79901 Telephone: (915) 5321486 Details: MFG BAKERY PRODUCTS.	SOUTHWEST CANNERS INC 2300 W 18th St Portales, NM 88130 Telephone: (505) 3566623 Details: MFG CANNED & BOTTLED CARBONATED BEVERAGES NON ALCOHOLIC.
REDDY ICE CORPORATION 3535 Travis St Ste 170 Dallas, TX 75204 Telephone: (214) 5221807 Details: MFG ICE.	SOUTHWEST COCA-COLA BOTTLING CO 6134 Ash Dr Lubbock, TX 79404 Telephone: (806) 4723200 Details: BOTTLING PLANT.
EARTHGRAINS CO RAINBO BAKING 111 Montano Rd NE	STAFFORD COUNTY FLOUR MILLS CO Church St

Albuquerque, NM 87107 Telephone: (505) 3453481 Details: MFG BAKERY PRODUCTS.	Hudson, KS 67545 Telephone: (800) 5305640 Details: MFR FLOUR & GRAIN ELEVATOR
EVERGREEN MILLS INC 314 S Broadway Ave, Suite 202 Ada, OK 74820 Telephone: (580) 3326611 Details: MFG FORMULATED ANIMAL FEED.	STAR SPECIALTY FOODS INC 300 Industrial Dr E Sulphur Springs, TX 75482 Telephone: (972) 2260267 Details: MFG SPECIALTY DAIRY PRODUCTS.
FARMER'S RICE MILLING COMPANY 3211 Hwy 397 S Lake Charles, LA 70615 Telephone: (337) 4335205 Details: RICE MILLING	STILWELL FOODS, INC Stilwell, OK 74960 Telephone: (918) 6963024 Details: MFG & PACKAGES FROZEN FOOD SPECIALTIES
FLOWERS BKG CO OF BATON ROUGE INC 1504 Florida Blvd Baton Rouge, LA 70802 Telephone: (225) 3819699 Details: MFG BAKERY PRODUCTS	TCBY ENTERPRISES INC. 2855 East Cottonwood Parkway, Ste, 400 Salt Lake City, UT 84121 Telephone: (800) 3486311 Details: MFG DISTRIBUTING AND RETAIL YOGURT FRANCHISING MFG AND DISTRIBUTING RESTAURANT EQUIPMENT AND FINANCING AND MFG ICE CREAM
FLOWERS BAKING CO OF TYLER INC 1200 W Erwin St Tyler, TX 75702 Telephone: (903) 5952421 Details: MFG BAKERY PRODUCTS.	TEXAS CITRUS EXCHANGE 702 E Exwy 83 Mission, TX 78572 Telephone: (956) 5858321 Details: MFG CANNED FRUITS/ VEGETABLES WHOL FRUITS/ VEGETABLES.
FOODBRANDS AMERICA INC 1601 NW Expwy Ste 1700 Oklahoma City, OK 73118 Telephone: (405) 8794100 Details: MEAT PROCESSOR SPECIALTY PRE-COOKED VALUE-ADDED PRODUCTS.	TEXAS FARM PRODUCTS COMPANY 915 S Fredonia St Nacogdoches, TX 75961 Telephone: (936) 5643711 Details: MFG PREPARED LIVESTOCK & POULTRY FORMULA FEEDS & DOG FOOD.
FRIONA INDUSTRIES, LP 500 S Taylor St, Ste 601 Amarillo, TX 79105 Telephone: (806) 3741811 Details: MFG CATTLE FEED BEEF CATTLE FEEDYARD & OPERATES GRAIN ELEVATOR.	THE MORRISON MILLING COMPANY 319 E Prairie St Denton, TX 76201 Telephone: (940) 3876111 Details: MFG FLOUR CORN MEAL & FLOUR MIXTURES.
FRITO LAY INC 7701 Legacy Dr Plano, TX 75024 Telephone: (972) 3347000 Details: MANUFACTURES & DISTRIBUTES SNACK FOODS.	TYSON FARMS OF TEXAS, INC 1019 Shelbyville St Center, TX 75935 Telephone: (936) 5982723 Details: POULTRY SLAUGHTERING DRESSING & PACKING.
GANDY'S DAIRIES INC 332 Pulliam St San Angelo, TX 76903 Telephone: (325) 6556965 Details: MILK PROCESSOR & WHOL ICE CREAM.	TYSON FOODS INC 2210 W Oaklawn Dr Springdale, AR 72762 Telephone: (479) 2904000 Details: PROC CHICKENS MFG TORTILLAS TORTILLA & TACO CHIPS PREP BEEF PORK PRODUCTS RAISES HOGS HARVEST & PROC SEAFOOD
GEORGE'S INC. 1302 North Kansas St. Springdale, AR 72764 Telephone: (479) 9277600 Details: POULTRY PROCESSING	UNIMARK GROUP INC 124 McMakin Rd Argyle, TX 76226 Telephone: (817) 4912992 Details: PROCESSOR OF FRUITS.

GOOD OLD DAYS FOODS INC 3300 South Polk St. Little Rock, AR 72219 Telephone: (501) 5651257 Details: MFG FROZEN DESSERTS	VALLEY FEED MILLS 299 Herring Rd Clint, TX 79836 Telephone: (915) 8512238 Details: MFG LIVESTOCK & POULTRY FEEDS.
GREAT PLAINS COCA COLA BOTTLING CO 600 N May Ave Oklahoma City, OK 73107 Telephone: (405) 2802000 Details: MFG SOFT DRINKS.	VERNON CALHOUN PACKING CO Old Boston Rd Palestine, TX 75801 Telephone: (903) 7292165 Details: MEAT PACKING PLANT.
GULF RICE MILLING INC 12010 Taylor Rd Houston, TX 77041 Telephone: (713) 4665441 Details: RICE MILLING.	WHITLOCK PACKAGING CORP 1701 S Lee St Fort Gibson, OK 74403 Telephone: (918) 4784300 Details: CANS FRUIT JUICES MFG TOILET TISSUE.
HOLMES FOODS INC 101 S Liberty Ave Nixon, TX 78140 Telephone: (830) 5821551 Details: POULTRY PROCESSOR.	WILLIAMS FOODS, INC 13301 W 99th St Lenexa, KS 66215 Telephone: (800) 2556736 Details: MFR FOOD SPECIALTIES
IMPERIAL HOLLY CORPORATION 8016 Highway 90a Sugar Land, TX 77478 Telephone: (281) 4919181 Details: CANE AND BEET SUGAR REFINING.	WM B REILY & CO INC. 640 Magazine St New Orleans, LA 70130 Telephone: (504) 5395200 Details: MFG FOOD INCLUDING COFFEE CONDIMENTS COOKING OILS & TEA.
INTERNATIONAL TRADING COMPANY 3100 Canal St Houston, TX 77003 Telephone: (713) 2240226 Details: MFG CANNED & SLICED MEATS.	WRIGHT BRAND FOODS INC 2300 McGee St Vernon, TX 76384 Telephone: (940) 5531888 Details: MFG PREPARED PORK PRODUCTS SPECIALIZING IN BACON & HAM. Sales: $120,000,000
J C POTTER SAUSAGE COMPANY 1912 Hwy 70 E Durant, OK 74701 Telephone: (580) 9242414 Details: MEAT PACKING PLANT.	YARNELL ICE CREAM COMPANY INC 205 S Spring St Searcy, AR 72143 Telephone: (501) 2682414 Details: MFG ICE CREAM & FROZEN DESSERTS
JACKSON ICE CREAM CO., INC. 2600 E 4th Ave Hutchinson, KS 67501 Telephone: (620) 6631244 Details: MFG ICE CREAM & PROCESS MILK PRODUCTS	ZAPATA PROTEIN USA INC 1087 Degravelle Rd Morgan City, LA 70380 Telephone: (985) 6312930 Details: MFG FISH OIL FISH MEAL & FISH PROTEINS & SOLUBLES.

L. Major Restaurant Chains Located in the Southwest United States

Arkansas

ANDY'S RESTAURANTS INC 1001 Highway 62 East	KENTUCKY FRIED CHICKEN 20704 Hwy 365 N

Mountain Home, AR 72653 Telephone: (870) 4253722 Details: Fast Food Restaurant	North Little Rock, AR 72113 Telephone: (501) 8510111 Details: Fast-Food Restaurants
DIXIE RESTAURANTS INC 1215 Rebsamen Park Rd Little Rock, AR 72202 Telephone: (501) 6663494 Details: Restaurant	MEXICO CHIQUITO, INC 102 S Rodney Parham Rd Little Rock, AR 72205-4708 Telephone: (501) 2248600 Details: Restaurants
FOWLER FOODS INC 139 Southwest Dr Jonesboro, AR 72401 Telephone: (501) 9356032 Details: Operates and Manages Restaurants	RCF CORPORATION 5 Shackleford Plz Little Rock, AR 72211 Telephone: (501) 2256021 Details: Restaurants
K-MAC ENTERPRISES INC P.O. Box 6538 Fort Smith, AR 72906 Telephone: (479) 6462053 Details: Restaurants	TURF CATERING COMPANY OF DEL 2705 Central Ave Hot Springs, AR 71901 Telephone: (501) 6240651 Details: Concessionaries and Oper. Gift Shop

Kansas

APPLEBEE'S INTERNATIONAL, INC. 4551 West 107th Street Overland Park, KS 66207 Type of Restaurant: Restaurant Chains	LONE STAR STEAKHOUSE & SALOON 224 E Douglas Ave Ste 700 Wichita, KS 67202 Telephone: (316) 2648899 Details: Steak Restaurant Chain
CHISHOLM ENTERPRISES INC 8100 E 22nd St N Wichita, KS 67226 Telephone: (316) 6859278 Details: Restaurant	MAVERICK RESTAURANT CORP 302 N Rock Rd Ste 200 Wichita, KS 67206 Telephone: (316) 6858281 Details: Restaurants
DALAND CORPORATION, 2414 N Woodlawn St Wichita, KS 67220 Telephone: (316) 6811081 Details: Restaurant and Management Service	MIDDLETON ENTERPRISES 9111 E Douglas Ave Wichita, KS 67207 Telephone: (316) 6819000 Details: Restaurants
FUGATE ENTERPRISES 208 S Maize Rd Wichita, KS 67209 Telephone: (316) 7225670 Details: Restaurant	NORTHFIELD RESTAURANT CORP 2414 N Woodlawn St Wichita, KS 67220 Telephone: (316) 6811081 Details: Restaurant
GODFATHERS PIZZA OKLAHOMA INC 2301 S. SENECA Wichita, KS 67213 Telephone: (316) 2624751 Details: Pizza Chain	NPC INTERNATIONAL INC 720 W 20th St Pittsburg, KS 66762 Telephone: (316) 2313390 Details: Restaurant Chains – Pizza and Family and Franchiser
GOURMET SYSTEMS OF KANSAS INC 4551 W 107th St Ste 100 Shawnee Mission, KS 66207 Telephone: (913) 9674000 Details: Restaurant	PERU PIZZA CO INC 2414 N Woodlawn St Wichita, KS 67220 Telephone: (316) 6816081 Details: Restaurant
HEARTLAND FOOD SERVICES INC 10983 Granada Ln Ste 106	PIZZA HUT OF FLORIDA, INC. 9111 E Douglas Ave

Shawnee Mission, KS 66211 Telephone: (913) 6611777 Details: Restaurant	Wichita, KS 67207 Telephone: (316) 6819000 Details: Restaurant
HIGH-PLAINS PIZZA, INC 2018 1st Ave Dodge City, KS 67801-2660 Telephone: (620) 2276243 Details: Restaurant	PIZZACO INC 121 W Marlin St Ste 300 Mc Pherson, KS 67460 Telephone: (316) 2410303 Details: Restaurant
INCOME PRODUCING MANAGEMENT 151 N Main St Ste 1000 Wichita, KS 67202 Telephone: (316) 2634480 Details: Restaurants	SINGLE TREE CORPORATION 2100 East 45th Street North, Wichita, KS 67219 Telephone: (316) 8387846 Details: Restaurant
J.S. VENTURES, INC 2400 N Woodlawn St Wichita, KS 67220 Telephone: (316) 6837799 Details: Restaurants	SIRLOIN STOCKADE INTERNATIONAL 2908 N Plum St Hutchinson, KS 67502 Telephone: (316) 6699372 Details: Restaurant
LL&G INCORPORATED 2908 N Plum St Hutchinson, KS 67502 Telephone: (316) 6691194 Details: Restaurant	SPANGLES INC 437 N Hillside St Wichita, KS 67214 Telephone: (316) 6858817 Details: Restaurant

Louisiana

ABL MANAGEMENT, INC. 11224 Boardwalk Dr Ste B Baton Rouge, LA 70835 Telephone: 1 (800) 3751293 Details: Contract Food Service	LUNDY ENTERPRISES, INC 10555 Lake Forest Blvd New Orleans, LA 70127 Telephone: (504) 2416658 Details: Pizza Restaurants
B & G FOOD ENTERPRISES INC 1430 Sandra St Morgan City, LA 70380 Telephone: (504) 3843333 Details: Fast Food Restaurant	MCDONALD'S 6006 Plank Road Baton Rouge, LA 70805 Telephone: (225) 3559150 Details: Fast Food Restaurant
COPELAND'S OF NEW ORLEANS 2421 South Macarthur Drive Alexandria, LA 71301 Telephone: (318) 4493761 Details: Restaurant	PICCADILLY CAFETERIAS INC 3232 S Sherwood Forest Bl Baton Rouge, LA 70816 Telephone: (225) 2934853 Details: Cafeterias and Seafood Restaurants
CUCOS INC 110 Veterans Memorial Blv Metairie, LA 70005 Telephone: (504) 8350306 Details: Operator Franchisor of Mexican Restaurants	PONCHARTRAIN FOODS INC 71711 Riverside Dr Covington, LA 70433 Telephone: (504) 8926173 Details: Owns and operates a fast food restaurant
GOLDEN FOODS INC 1707 Shannon St Monroe, LA 71201 Telephone: (318) 3878631 Details: Restaurant	SONTHEIMER OFFSHORE CATRG CO 5450 West Main Street Houma, LA 70360 Telephone: (985) 8510727 Details: Offshore Caterer
JOHNNY'S PIZZA HOUSE 100 Arkansas Road West Monroe, LA 71291 Telephone: (318) 3230518 Details: Restaurant	SPECIALTY FOOD SYSTEMS INC 1320 Lakewood Dr Slidell, LA 70458 Telephone: (985) 6410517 Details: Restaurant

New Mexico

BLAKE'S LOTA BURGER INC 1300 San Mateo Boulevard Southeast Albuquerque, NM 87108 Telephone: (505) 2555601 Details: Fast Food Restaurants	GARDUNO'S OF MEXICO 10555 Montgomery Blvd Ne Albuquerque, NM 87111 Telephone: (505) 2985514 Details: Mexican and American Restaurant
FRESQUEZ INC Albuquerque Internat Albuquerque, NM 87101 Telephone: (505) 8424280 Details: Fast Food Restaurant	

Oklahoma

ARBY'S UNITED STATES BEEF CORPORATION 4923 E 49th St Tulsa, OK 74135 Telephone: (918) 6650740 Details: Restaurants	SONIC CORP 101 Park Ave Oklahoma City, OK 73102 Telephone: (405) 2807650 Details: Drive-In Restaurants
COCINA DE MINO INC 6022 South Western Avenue Oklahoma City, OK 73129 Telephone: (405) 6321036 Details: Mexican Food Restaurants	

Texas

ALAMO RESTAURANTS INC 754 Isom Road, San Antonio, TX 78216 Telephone: (210) 3411336 Details: Restaurants	PANCHO'S MEXICAN BUFFET, INC 3500 Noble Ave. Fort Worth, TX 76111 Telephone: (817) 8381400 Details: Mexican food restaurant
AUSTACO INC 1905 South Capital of Texas Highway Austin, TX 78746 Telephone: (512) 3282163	PAPPAS RESTAURANT 3950 South Terminal Road Houston, TX 77032 Telephone: (281) 4433330 Details: Restaurants
BLACK-EYED PEA RESTAURANTS 7979 Belt Line Road, Dallas, TX 75254 Telephone: (972) 4901932 Details: Line of Restaurants	PHILLIPS BROTHERS RESTAURANTS 12900 Preston Rd Ste 1111 Dallas, TX 75230 Telephone: (972) 2330861 Details: Fast Food Restaurant
BRINKER INTERNATIONAL INC 6820 Lyndon B Johnson Fwy Dallas, TX 75240 Telephone: (972) 9809917 Details: Operates Family Chain Italian & Mexican Restaurants, Franchises Restaurants	PIZZA HUT OF AMERICA INC 14841 Dallas Pky Dallas, TX 75240 Telephone: (972) 3387700 Details: Restaurant
CHEDDAR'S INC 812 Six Flags Dr Arlington, TX 76011 Telephone: (817) 6406073 Details: Restaurants and Bar	PIZZA HUT OF EAST TEXAS, INC 2824 Bill Owens Pky Longview, TX 75605 Telephone: (903) 2971111 Details: Restaurants

D. T. H. ENTERPRISES, INC. 4611 50th Street Unit B Lubbock, TX 79414 Telephone: (806) 7951283 Details: Fast Food Restaurant Chain	PIZZA PROPERTIES INC 1580 George Dieter Drive El Paso, TX 79936 Telephone: (915) 8552121 Details: Restaurant
DAVE & BUSTER'S INC 10727 Composite Drive Dallas, TX 75220 Telephone: (214) 3530620 Details: Restaurant & Adult Amusement Attractions **http://www.daveandbusters.com**	PULIDOS MEXICAN RESTAURANTS 2900 Pulido St Fort Worth, TX 76107-5712 Telephone: (817) 7314241 Details: Mexican Restaurant and Whol. Groceries
DOS GRINGOS INC 8500 Old Denton Rd Keller, TX 76248 Telephone: (817) 4313644 Details: Restaurants and Franchiser	RANKEN INC 8802 Shoal Creek Blvd Austin, TX 78757 Telephone: (512) 4547739 Details: Restaurant
EL CHICO MEXICAN RESTAURANTS 2031 Abrams Road Dallas, TX 75214 Telephone: (214) 8215785 Details: Mexican Restaurants, restaurant franchisor and wholesale food service equipment	RESTAURANTS OF AMERICA MGT 6380 Lyndon B John Fry 1 Dallas, TX 75240 Telephone: (972) 4908855 Details: Restaurant
FRIDAY'S HOSPITALITY WORLDWIDE 7540 Lyndon B Johnson Fwy Dallas, TX 75251 Telephone: (972) 4505400 Details: Holding company which operates restaurants serving alcoholic beverages and franchises such restaurants	ROSA'S CAFE & TORTILLA FACTORY 1701 North County Road West Odessa, TX 79763 Telephone: (432) 3373122 Details: Restaurant
FURR'S BISHOP'S INCORPORATED 4414 82nd Street Unit 218 Lubbock, TX 79424 Telephone: (806) 7912058 Details: Operator of cafeterias	SONIC DRIVE-IN OF AUSTIN 2102 Faro Drive # 620 Austin, TX 78741 Telephone: (512) 2632053 Details: Fast food restaurant
GREAT AMERICAN FOODS CORP Hwy 259 N Ore City, TX 75683 Telephone: (903) 9688630 Details: Restaurant & Whol. Fish	SOUPER SALADS FRANCHISES INC 140 Heimer Rd Ste 400 San Antonio, TX 78232 Telephone: (210) 4908863 Details: Restaurants
HAHN ENTERPRISES INC 400 Montana Ave El Paso, TX 79902 Telephone: (915) 5449777 Details: Restaurant	STEAK AND ALE RESTAURANTS 4109 West Camp Wisdom Road Dallas, TX 75237 Telephone: (972) 2969923 Details: Steak Restaurant & Cocktail Lounges
HALJOHN FRANCHISE OFFICE, MACDONALD'S 704 East Wonsley Drive Austin, TX 78753 Telephone: (512) 8372551 Details: Fast Food Restaurants	T FORD ENTERPRISES 113 East 3rd Street, Taylor, TX 76574 Telephone: (512) 3528531 Details: Restaurant
KETTLE RESTAURANT 15360 John F Kennedy Boulevard Houston, TX 77032 Telephone: (281) 5906770 Details: Family restaurant	TACO CABANA INC 8918 Tesoro Dr Ste 200 San Antonio, TX 78217 Telephone: (210) 8040990 Details: Fast Food Independent Mexican Restaurant
LA MADELEINE INC	TGI FRIDAY'S, INC

6060 N Centl Expy Ste 138 Dallas, TX 75206 Telephone: (214) 6966962 Details: Restaurants	7540 Lyndon B Johnson Fwy Dallas, TX 75251 Telephone: (847) 9690126 Details: Restaurants serving alcoholic beverages & franchiser of such restaurants
LA RAZA PIZZA, INC 4411 Ridgecrest Cir Amarillo, TX 79109 Telephone: (806) 3537296 Details: Restaurant	THE ORIGINAL PASTA COMPANY 2617-A Holcombe Houston, TX 77025 Telephone: (281) 6810098 Details: Restaurant
LALANI INVESTMENTS INC 1111 Holliday St Wichita Falls, TX 76301 Telephone: (940) 7236648 Details: Restaurants	TONY ROMAS FAMOUS FOR RIBS 9304 Forest Ln Dallas, TX 75243-6238 Telephone: (214) 3437800 Details: Restaurants
LITTLE CAESAR OF SAN ANTONIO 925 Coronado Blvd Ste 100 Universal City, TX 78148-3236 Telephone: (210) 6580998 Details: Pizza Takeout Restaurant	TRAIL DUST STEAK HOUSE ARLINGTON 2300 East Lamar Boulevard Arlington, TX 76006 Telephone: (817) 6406411 Details: Operates steak restaurants
LONE STAR CAFE INC 9811 Anderson Mill Rd Austin, TX 78750-2262 Telephone: (512) 3315444 Details: American Restaurant	UNCLE JULIO'S 16150 Dallas Parkway Dallas, TX 75248 Telephone: (972) 3800100 Mexican Restaurant
LUBY'S CAFETERIAS INC 2211 NE Loop 410 San Antonio, TX 78217-4630 Telephone: (210) 6549000 Details: Cafeterias	W F K R INC 314 E Highland Mall Blvd Austin, TX 78752 Telephone: (512) 4526654 Details: Cabaret
LUTHER'S BAR-B-Q, INC 2611 Fm 1960 Rd W Houston, TX 77068 Telephone: (281) 5378895 Details: Restaurant	WATER STREET LIMITED 320 Williams St Corpus Christi, TX 78401 Telephone: (361) 8822211 Details: Restaurant
MARCOS MEXICAN RESTAURANTS 7652 FM 1960 West, Houston, TX 77070 Telephone: (281) 8900880 Details: Mexican Restaurant & Bar	WAUGH ENTERPRISES INC 10903 Alder Circle Dallas, TX 75238 Telephone: (214) 3499600 Details: Restaurant
MARK OF EXCELLENCE PIZZA CO 2817 Brown Trail Bedford, TX 76021 Telephone: (817) 2858278 Details: Restaurant	WHATABURGER RESTAURANTS 7727 Lockheed Dr El Paso, TX 79925-2403 Telephone: (915) 7740051 Details: Fast food restaurant
MR GATTI'S 210 Sidney Baker Street South Kerrville, TX 78028 Telephone: (830) 8965555 Details: Operator of Pizza Chain Restaurants **www.mrgattis.com**	WHATABURGER OF MESQUITE, INC 3200 N Town East Blvd Mesquite, TX 75150 Telephone: (972) 2703400 Details: Fast food restaurants
MTC INC 800 Dolorosa Ste 204 San Antonio, TX 78207 Telephone: (210) 2253955 Details: Mexican Restaurant	WHATABURGER RESTAURANTS - RESTAURANTS, SOUTH 510 Texan Trail Corpus Christi, TX 78411 Telephone: (361) 8554237 Details: Operator of restaurants
OXBOW ENTERPRISES, L.C.	

6300 Ridglea Pl 320 Fort Worth, TX 76116 Telephone: (817) 3775226 Details: Fast Food Restaurant	

M. Trade Shows and Marketing Events

Southwest US Trade Show/Event/Fair Location	**Contact**	**2006 Date**
Dallas National Gourmet Show Dallas Market Center Dallas, TX	214-655-6100 or 800-DAL-MKTS	January 20-23, June 23-26 and September 15-17
Oklahoma Home & Garden Show State Fairgrounds of Oklahoma Oklahoma City, OK	(713) 529-1616	January 20-22
26th Annual Spring Fort Worth Home & Garden Show Fort Worth Convention Center Fort Worth, TX	(713) 529-1616	January 27-29
Texoma Farm & Ranch Show Multi-Purpose Events Center Wichita Falls, TX	1 (800) 827-8009	February 15 – March 16
7th Annual Spring Texas Home & Garden Show Will Rogers Memorial Center Fort Worth, TX	(713) 529-1616	February 24-26
Annual National Fiery Foods & Barbecue Show Sandia Resort and Casino Events Center Albuquerque, NM	Sunbelt Shows 505- 873-8680	March 3-5
Annual Spring Texas Home & Garden Show Austin Convention Center Austin, TX	(713) 529-1616	March 3-5
25th Annual Spring Houston Home Show George R. Brown Convention Center Houston, TX	(713) 529-1616	April 21-23
3I Farm Show Landoll Corporation Great Bend, KS	785-562-5381	May 11-13
Southwest Foodservice Expo George R. Brown Convention Center Houston, TX	1-800-395-2872	June 25-27
Louisiana Foodservice EXPO Ernest N. Morial Convention Center New Orleans, LA	504-454-2277	August 5-7

16th Annual Fall Fort Worth Home & Garden Show Fort Worth Convention Center Fort Worth, TX	(713) 529-1616	August 18-20
25th Annual Fall Houston Home Show George R. Brown Convention Center Houston, TX	(713) 529-1616	August 18-20