

Despite the differences between fresh produce and CPG's, produce is increasingly being asked to conform to the protocols of CPG's:*

- Channel captains
- Contract pricing between shippers and buyers (both foodservice and retail)
- Longer-term relationships less focused on short-term price instability
- Fees and rebates – cost to play grows
- Services - data-based sales and marketing support as well as food safety

*Consumer packaged goods

Jack Welch, legendary CEO of GE:

- “You must be on top of change or change will be on top of you.”
- “Control your destiny or somebody else will.”
- In fresh produce fresh-cut has shown the way for channel captains – do you want to be the captain or dance to the captain’s tune?

Value creation at the input supplier/shipper interface - new go to market strategies

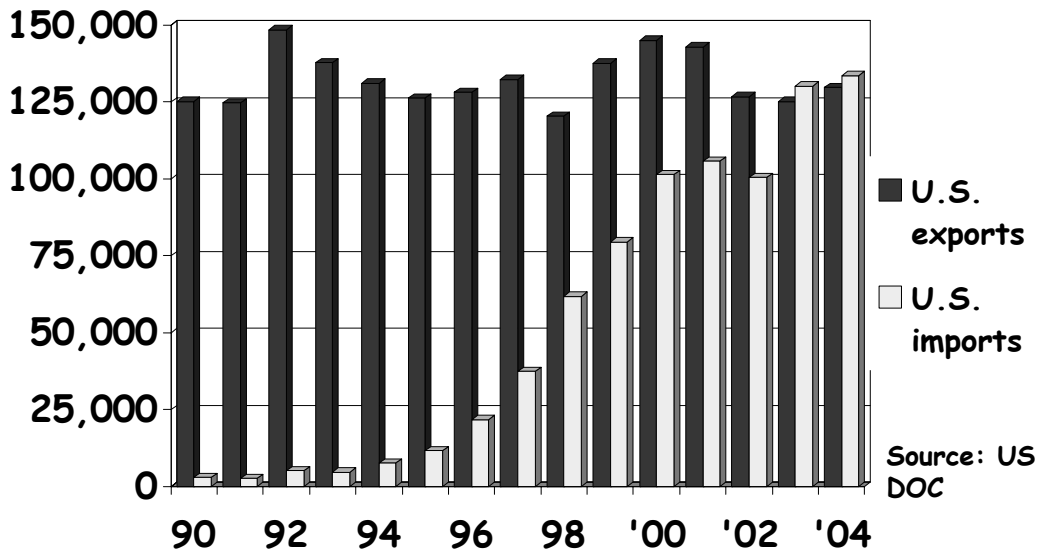


US Private Label Market Share

Year	Dollar share	Unit share
	<i>percent of total sales</i>	
1989	11.6	15.3
1993	13.9	18.2
1995	14.9	19.4
1997	15.7	20.1
1999	16.1	20.8
2003	16.5	21.6

Source: *Private Label*, March/April various years

U.S.- Canadian fresh tomato trade, 1990-2004, Metric Tons



U.S.- Canadian fresh tomato trade, 1990-2004, Million US\$

