

Agribusiness Men and Women

FRED I. JONES*

TELL THE college editors they could save a lot of postage if they'd be more selective in what they send and to whom. We have no interest in home gardening material, for instance, yet get bunches of it.

Sound familiar? It should. That's what this meeting is all about. Defining and **knowing** your audience is the first requirement for effective communication.

That comment about home gardening material, for example, doesn't come from a farm editor or broadcaster. It comes from an agricultural—agribusiness—marketer. Obviously, he's on one of your mailing lists. And he must find some of the information helpful. At least, he adds, "I find our state college editors and editorial people most cooperative and could not desire a better relationship than I enjoy with them."

Sorry, I can't tell you who he is. The comment was anonymous. It came as a reply to a survey I conducted recently for this meeting among agricultural marketing, advertising and communications people across the country. More about that later.

My assignment is to define and analyze "Agribusiness Men and Women" as an audience category for AAACE members. Actually, there is no such animal as the "agribusiness" audience. The vast complex we know as agribusiness is comprised of hundreds of audiences. They present a tremendous challenge.

What is "agribusiness" really? The two scholars usually credited with coining the word, John H. Davis and Ray A. Goldberg of Harvard University (3), defined it as "the sum total of all operations involved in the manufacture and distribution of farm supplies; production operations on the farm; and the storage,

* Vice-President and Manager, Public Relations Services, E. H. Brown Advertising Agency, Inc., Chicago. Former Agricultural Editor, Ohio State University and OARDC.

processing, and distribution of farm commodities and items made from them."

Another authority, Dr. Ewell Paul Roy (11), professor of agricultural economics and agribusiness at Louisiana State University, puts it this way: "Agribusiness is the coordinating science of supplying agricultural production inputs and subsequently producing, processing, and distributing food and fiber." Dr. Roy says that some authorities exclude "farming" or "producing" from the definition. That's our approach here. "Commercial agriculture" is being treated as a separate audience.

Last year, consumers spent an estimated \$190 billion for food, beverages, clothing, footwear, and tobacco—products associated with agribusiness. This was one-third of all consumer outlays.

How Big is Agribusiness?

How big is our combined agribusiness audience? Despite the shrinking farm labor force, total employment in agribusiness is expected to remain at about 24 million through 1975. That means, of course, that off-farm agribusiness will require more workers. By 1975 there will be an estimated 7.5 million workers in farm supplies and services, 3.9 million in farm production, and 12.5 million in off-farm handling, processing, and distribution.

Therefore, we are talking about a potential off-farm agribusiness audience complex of 18 to 20 million workers. You may be sure that I cannot and will not attempt to analyze all of these audiences. But some "ball park" group figures might be useful. It's up to you to select those that are most important to you and concentrate on them.

Many major corporations are involved in the farm supply business. More than 600, for example, manufacture autos and trucks, drugs and medicines, hardware and tools, chemical products, paints, farm equipment, automotive parts, petroleum products, rubber, and iron and steel for the farm market. Some, like American Cyanamid Company's Agricultural Division, serve many different kinds of agricultural producers. Cyanamid's fertilizers, pesticides, animal health products, and animal feed supplements are major production inputs.

But this is only the beginning. Dr. Roy estimates there are 19,000 agribusiness establishments manufacturing various kinds

of farm supplies. And don't forget the power suppliers, insurance companies, and credit institutions.

Besides manufacturing plants and company-owned dealerships selling directly to farmers, the farm supply business includes 12,000 feed mill and mixer establishments, 21,500 farm supply stores, 3,500 home and garden supply stores, 16,500 farm equipment retailers (supplied by 900 manufacturers of all sizes), and 29,000 lumber and building material dealers.

The Feed Business

I could write a separate paper on each one of these audiences. For example, the feed business includes 7,000 establishments with 8,000 mills that produce 1,000 tons or more of feed a year. Other figures tell us that small mills have average investments of about \$50,000; large mills are worth millions. The majority of mill operators develop their own brand names, and market competition is fierce. Service is becoming increasingly important.

Here's what one keen observer in the field, William C. Coleman (2), editor of *Feed Management* magazine, has to say about the feed industry based on his 25 years of close association with it:

"I have always been impressed with the feed industry's 'moral' tone. Like all of us, feed people are out to make a buck—that's what life demands—but they do seem to try to do so honestly. One very interesting fact is the number of feed firms active in their state trade associations. I would guess that 90-95 per cent of all feed manufacturers are members of their state associations where they can learn to update their service practices.

"I find, too, that since selling feed is an extremely face-to-face venture, most feedmen can be said to 'know the territory.' Records may be kept in their head, but they know whether Farmer Brown is milking Holsteins or Guernseys, how many, their blood lines, and when American Breeder Service last paid a call. Of course, they know where he banks, where he buys his farm equipment, how many children he has, and have a fair approximation of his net worth.

"They work with Farmer Brown and his veterinarian on his herd health program; they helped him build his bulk bin and keep it serviced. They don't worry too much about his feed bal-

ance, as long as he keeps fairly current with the bi-weekly milk check.

“A great many—a majority, at least—feed some livestock or poultry for their own account. For profit? Yes, but for information, too. They learn and they pass on what they learn to their customers—such as how to grow out dairy beef; confinement housing for swine; forced molting of layers—you name it. Is it efficient and is it profitable—that’s the yardstick applied to a hundred management and feeding practices by those active in the feed industry. Like automobile manufacturers, they seem willing to provide the test track.

“I could go on and on—feeder meetings, forage and grain testing services, marketing assistance, custom mixing, grain banking, etc. But I think you have the idea now that I consider feedmen about as technically competent, aggressive, personally involved, and profit-minded as any industry people serving agriculture. Anything less and they are doomed to failure.”

The Farm Supply Dealer

Another important local audience is the farm supply dealer. Emmet J. Hoffman (6), editor of *Farm Store Merchandising*, estimates there are 40,000 retail outlets in the U.S. that sell farm supplies. Just about 32,000 of them, however, account for 85 per cent of all feed, fertilizer, farm chemicals, and related supplies sold. Sixty-eight per cent of these dealers are in towns of less than 5,000 population. They are concentrated in areas where agriculture is predominant. Annual sales average \$556,000 and 6.6 persons are employed per store. Forty-two per cent do on-the-farm selling, with 76 per cent of the owners or managers making farm calls.

“Of all the merchants on main street, the local dealer knows and understands the farmer best,” Hoffman says. The dealer often consults with the farmer on financial matters, is an opinion leader in his community, and contributes generally to community welfare.

A 1969 survey conducted by *Farm Supplier* magazine (12) found that the average dealer was 46 years old, had completed four years of high school (40 per cent had attended college), and had been at his present business location for 13 years.

Again, I asked an experienced trade paper editor to analyze this audience for us. Ray Bates, editor of *Farm Supplier* (1), replied:

“He is practically always a farm-oriented person who has gravitated into the farm supply business through special interest in selling and/or management. His thinking, therefore, is very much like that of today’s large commercial farmer with whom I feel he identifies rather closely. In fact, many successful dealers also have their own farming operations, either on a demonstration or a commercial basis.

“The good dealer is quite a time-oriented person, as he has many demands for his attention during the day—from customers, employees, salesmen, and his local business counterparts. On top of this, he needs to sit down and plan his sales promotions, credit and collection procedures, and other business management functions. The dealer who best does this is most successful—just like the large farm operator who is more of a manager than an actual farm worker.

“The average farm supply retailer is, therefore, usually pressed for time and seldom writes a letter. He is person-to-person-oriented, so he operates much better when he is talking to a man face-to-face or can pick up the telephone.

“At the same time, he is knowledgeable about many facets of farming and the input products needed. This is a facility which he gains through his frequent contacts with both suppliers and area farmers. He becomes, therefore, sort of a clearing house of practical information for his customers and prospects. He is the best there is around for this function, and that evaluation can also include county agents.

“Clearly associated with this is the fact that he is service-minded. He has to be because today he is often selling service as much as he is products. This also means that the dealer is friendly and outgoing, and is quite willing to share information. In my own calls on dealers, it is continually remarkable to me how much and how quickly they will open up in describing their own business to a person who is essentially a stranger.

“As to goals, I would say that making money rates at the top of the list, tied in with the genuine desire to be of service to their fellowmen, and particularly farmers. They have an innate feeling that no occupation or profession could be any more fundamental

than farming, and they closely identify with agriculture in their sales and service efforts."

The Farm Equipment Dealer

Another important local agribusinessman is the farm equipment dealer. According to *Implement & Tractor* magazine (10), 57 per cent of these dealers are located in towns of under 6,000. The average dealer's territory embraces 300 to 600 farms within 10-30 miles.

A similar study by *Farm & Power Equipment* magazine (4) finds that the average dealer has owned or operated his business for 25 years. He employs 11½ people, maintains a service shop (98.4 per cent do), and handles only one major line franchise (88.7 per cent). Nine out of 10 dealers also sell short-line or allied farm equipment and related products, especially lawn and garden equipment (77 per cent). Half (49.5 per cent) of them grossed more than \$500,000 in 1969.

Lumber and Building Material Dealers

The fourth group of local suppliers, lumber and building material dealers, cater to other buyers as well as farmers. Most are locally owned and operated. Franchising is popular between the material suppliers and dealers. Because of the bulkiness of their products, these dealers tend to operate within a few miles of their stores.

Local suppliers are important key audiences for you. They should be your allies. Together, you can achieve a synergistic effect in meeting the informational needs of agricultural producers. How much of this is your responsibility and how much rests with county agents and specialists is something you must decide.

Agribusiness Marketing Systems

On the other side of the agricultural producer is the agribusiness marketing system—getting the food and fiber from the farms into final forms and delivered to the ultimate consumers. For food alone, USDA's Economic Research Service (9) estimates some 800,000 companies employ 5.3 million full-time workers in

processing (1.4 million), wholesaling (0.6 million), retail stores (1.4 million), and eating places (1.9 million).

Obviously, there are many different agribusiness audiences here. For example, there are 14,000 assemblers between the farmer and processor—milk and cream receiving stations, egg sorting plants, fruit and vegetable packing and sorting sheds, country grain elevators, livestock terminals, and all kinds of buyers.

Then, too, there are thousands of handlers and processors of farm products—oil mills, rice mills, grain elevators, canneries, manufacturers of textiles, apparel, paper and paperboard products, storage establishments, transportation and communication facilities. Farm products account for half of all goods transported by truck, rail, water, air, or pipeline.

Food Wholesalers and Brokers

A highly specialized audience here is the food wholesaler and broker—"Buyers by the Carload," as Alden C. Manchester describes them in the 1969 USDA Yearbook, *Food For Us All* (8). These are the people who bridge the gap between food packers and processors and our 200,000 grocery stores. He says the average broker serves 22 companies, none of which sell the same kind of products. He sells and merchandises 25 brands and 245 items, employs eight salesmen, and has a sales volume of around \$5 million a year.

"The broker's strongest traits," according to Manchester, "are his intimate knowledge of local market conditions; close personal relationships with local buyers; and awareness of the likes and dislikes of both grocers and consumers."

Besides the grocery stores, there are thousands of convenience food stores, specialty shops, discount food stores, automatic merchandisers, 344,000 public eating places, and all kinds of institutional food facilities (schools, hospitals, prisons, military bases, factories, clubs, camps, etc.). Also classified as agribusiness retailers are 40,000 packaged liquor stores, 111,000 drinking places, and 5,000 cigar stands. Add in the various department and specialty clothing, shoe, leather goods, variety, and furniture stores and florists' shops and you begin to wonder what *isn't* agribusiness!

Professional Communicators

In considering the vast array of audiences involved in the agribusiness complex, it seemed that AAACE should have a keen interest in the professional communicators **within** agribusiness. The marketing, advertising, public relations, sales, market research, and technical people associated with marketing of products and services should be a prime audience, or audiences, for your informational products. Not only can they use such information themselves, they can also relay it to your other audiences.

Very little profile data about this audience was available. Therefore, I drew up and mailed a questionnaire to find answers to several basic questions: What kind of people are they? Where do they come from? Why did they choose agricultural marketing/advertising/communications as their careers? Where do they obtain new agricultural information? How do they view the future of their business or profession?

My questionnaire actually went to two distinct audiences which have some common characteristics: First, 150 members of the Agricultural Relations Council, a national organization made up primarily of public relations people in agribusiness; second, to 450 persons selected by taking a random sample of every *n*th name from the mailing list of *Agri Marketing* magazine. From the two lists, I eliminated libraries, persons outside the United States, extension, USDA, and experiment station workers, and full-time farm editors and broadcasters. The latter, of course, were analyzed by Cordell Hatch.

I am indebted to Charles Hughes of Armour & Company, president of the Agricultural Relations Council, and to Gerald Wilkins, editorial director of *Agri Business Publications*, for their cooperation in providing the mailing lists and for their valuable advice. (And to my agency associates, wife, and secretary for pretesting and tabulating help.)

The questionnaires were coded so that I could tabulate and analyze replies from the two groups separately and combined. I used my home address rather than the agency's for mailing and returns to help eliminate any impression that this was an agency project. My purpose was identified with this AAACE meeting.

The total of 280 usable returns represents a respectable 46.6 per cent. The percentage was higher—65.3—for the ARC group

in which I am an active member, but the 40.4 per cent reply from *Agri Marketing* readers was most gratifying.

Survey of Communicators

What did I find out? First, that more than half of these agribusiness marketers and communicators (52.6 for ARC and 57.1 per cent for AG MKTG) grew up on farms. Not surprisingly, 42.3 per cent of the ARC group and 52.2 per cent of the others listed their father's occupation as farmer or rancher. Actually, these percentages were **lower** than I expected. They do bear out, though, the importance of farm background in this segment of agribusiness.

Thirty per cent of the ARC members and 26 per cent of the agrimarketers grew up in small towns. A fourth of each group grew up in cities, metropolitan areas, or suburbs. (Percentages total more than 100 because several listed more than one place.)

Education

College education ranks high among these marketers and communicators (99 per cent for the ARC group, 89.6 per cent for the others). As might be expected, land-grant universities are well represented. In the ARC group, 61.5 per cent listed these institutions among the total of 58 colleges and universities attended. Within the marketing group, 71.8 per cent have attended land-grant universities. They named 80 different colleges.

More than seven out of 10 of those who have attended college hold bachelor's degrees (73.2 per cent for ARC and 71.8 per cent for AG MKTG). Two of 10 also hold master's degrees (20.6 per cent ARC, 18.4 per cent AG MKTG). There are even some doctorates (5.2 per cent ARC, 3.7 per cent AG MKTG).

As for major subjects studied, 34.4 per cent of the ARC group had specialized in communications, journalism, agricultural journalism, or advertising. Another 34.4 per cent chose agricultural education or technical subjects in agriculture; liberal arts claimed 29.1 per cent and economics or business drew 25.0 per cent. (Some gave more than one major.) Sixty-seven per cent had received other professional education or training.

Educational orientation was slightly different among the marketers. The largest group, 46.0 per cent, had majored in agricultural education or technical subjects in agriculture. Economics

(including agricultural), marketing, business, and business administration ranked next with 28.2 per cent. Communications, journalism (including ag), and advertising appealed to 22.1 per cent, and liberal arts were popular with 14.7 per cent. Nearly half (47.9 per cent) reported additional professional education or training.

Positions Held

What positions do these men and women hold? Half of the ARC respondents are directors or managers of communications, public relations, or information. Another 12.5 per cent are owners, presidents, or chief executive officers of companies or associations; 13.5 per cent are executive vice-presidents or secretaries, 5.2 per cent are editors, and 4.2 per cent are agency account executives.

Other positions include state director of agriculture and managers of advertising, marketing, world trade, rural health, and a fair. Salaries range from under \$10,000 to more than \$30,000, with 14 per cent in the higher bracket. Median income is about \$19,000 per year. They average 6.93 years in their present positions and have held an average of 2.33 previous jobs.

As expected, the AG MKTG group represents a wider variety of positions. Sales and advertising/marketing each account for 22 per cent. These include national, district and territory sales managers and field representatives, advertising managers and directors, vice presidents, and specialists in promotion and development. Another 18.1 per cent are company owners, presidents, general managers, executive vice-presidents, or other officers. Advertising agency presidents, supervisors, account executives, copywriters, and media managers make up 12.6 per cent.

Other categories include editors, publishers, communications and public relations directors or managers, advertising space and time salesmen, product managers, office managers, distributors, and various specialists such as agronomist, nutritionist, animal scientist, and engineer.

Salaries for the marketers range from under \$10,000 to more than \$30,000, with 14.2 per cent in the upper bracket. Median income is slightly under \$18,000. They average 6.77 years in their present jobs and have held 2.21 previous jobs.

Obviously, this combined audience is a highly sophisticated, experienced group of professional communicators and marketers.

What's more, 30 per cent of the combined audience has been employed at some time by the USDA, state land-grant university, experiment station, or extension service. The percentage is higher (37.6) for ARC members than for the marketers (25.7), but the average tenure is longer for the latter (5.4 versus 4.9 years). The respondents have worked in 30 different states, Puerto Rico, Washington, D.C., and at Beltsville. Several have held more than one position. Nearly a third (32.1 per cent) have been in teaching and research, 19.8 per cent have worked as county agents, 16.0 per cent have worked for some USDA agency, and 14.8 per cent have been editors or information specialists.

Contacts with Universities or USDA

Eight out of 10 indicated they have contacts with county agents, USDA, university, extension, or station people now. More than half (53.0 per cent) reported monthly or more frequent contacts.

What types of information do they receive from these sources? Research, production, new products, and general ("all kinds") rank almost equally with economic data and market information (28.0 per cent and 26.8 per cent, respectively). Crop practices, varieties, and reports were of interest to 17.2 per cent and live-stock management, breeding and feeding information was obtained by 12.2 per cent. Government programs interest 8.2 per cent.

Sources of Agricultural Information

Asked to rate 24 common sources of agricultural information as good, fair, or poor, both groups placed farm and trade periodicals at the top with extension specialists second. The marketers rated experiment station researchers third, professional farm managers fourth, and commercial company publications fifth. ARC members rated extension/station editors third, company publications fourth, and station researchers fifth.

Several respondents were hesitant to rate sources, explaining that these varied with individuals and companies. Others rated only those with which they were most familiar.

Nearly half (46.1 per cent) of the marketers and communicators indicated they read or scan one to 10 farm magazines and trade journals each month; 29.3 per cent checked 11-20 periodicals; 13.6 per cent marked 21-30, and 9.6 per cent said they looked at more.

More than two-thirds (69.2 per cent) listen to farm radio regularly or occasionally, but only 19.4 per cent are "regulars." As for farm television, nearly half (48.4 per cent) watch some, but only a small group (2.9 per cent) are regular viewers. They named 84 different radio and 60 TV outlets.

How Many Operate Farms

Since more than half of these agribusiness people grew up on farms, I was curious as to how many own or operate farms now. The answer was 21.9 per cent. Not all reported acreage, but the average of those who did was 307.4 acres per farm. Grain was the major enterprise, followed by beef cattle, cotton, dairying, and general livestock. Two farm owners are producing catfish.

Remember my opening comment about home gardening information? Well, it's not all wasted. Aside from their business interests, 47.7 per cent of the marketers and communicators are home gardeners. They raise vegetables, flowers, fruit, trees, and "everything," in that order.

These people are real "joiners," too. They average 1.9 professional organizations each. Besides the Agricultural Relations Council, other favorite organizations included NAAMA, other ad clubs, PRSA and various press clubs, Sigma Delta Chi, American Marketing Association, professional societies (ASAS, ASAE, ESA, ASA, etc.), AFMA and other feed groups, ASTA and other seed trade groups, AAEEA, NAFB, and AAACE. Farm Bureau and cattle feeder associations were mentioned, but there was a marked absence of general farm groups.

Reasons for Choosing Ag Marketing Career

Reasons for choosing agricultural marketing, advertising, or communications as a career fell into four main groups. The largest, 29.4 per cent, included farm background, interest in farm people, and family business. Next was challenge, opportunity, salary, and a desire to be of service (27.2 per cent). A surprisingly

large group, 26.9 per cent, said they got into this field accidentally, because they "needed a job," or because their agency or company assigned them to it. Some actually chose their careers because of aptitude, education, or training (10.8 per cent).

Future Changes

My question: "What changes do you think will occur in agricultural marketing, advertising, and communications in the next 10 years?" drew an enthusiastic response. Only six persons expect little change.

Nearly a third of the respondents (32.3 per cent) mentioned more sophistication in agribusiness, marketing, advertising, communications, and farming—more demanding, more facts, more services, more systemization, higher quality personnel. A fourth foresee improved communications—more specialized vertical publications, fewer generals, more audio-visual aids, more direct mail, changes in radio and television, "rifled" advertising.

Greater specialization, technical competence, and more complex and intense practices are predicted by 17.2 per cent. Fewer and larger farms, better management, and greater integration in agricultural production drew 14.3 per cent. A like number (14.0 per cent) expect more personal contact, direct selling, and demonstrations to be used. Other changes: more government regulation, consumerism, environmental concern, and need for public relations for agriculture (8.2 per cent), and stronger bargaining and marketing, more cooperatives, worldwide emphasis (5.0 per cent).

Here are a few quotes:

- "More facts. We're seeing it right now, with or without Ralph Nader's leadership. We've been far too lax in giving out the facts. No wonder consumers don't listen to us or believe our ads or market information."

- "Tougher, more competitive for ear of receivers. Listen more ourselves and show we are really interested in problems of others."

- "Will become more intense and specialized with greater emphasis on skill and professionalism. Salary scales will improve greatly for those who strive to develop the skills and apply them. There will be greater need and effort for 'agricultural interpreters' to bridge the understanding gap between agriculture and

consumers. In encouraging young people to enter our ranks, we need to stress equally the need for progressive excellence as well as opportunity that is available."

- "Commercial organizations will become more important as sources of information for larger farmers and ranchers."

- "Trend away from university and to industry for information."

- "Closer contact with consumer. Simpler, more-to-point advertising."

- "Specification buying—factory production of livestock and crops. Stronger cooperatives in farming, or a switch to corporation farming by large corporations."

- "Communication channels will shorten considerably, lessening the need for media as we know them today. In 10 years the major medium to communicate with farmers will be something which hasn't been invented yet."

- "Much of the 'fat' of ag marketing, advertising will be dropped. Many companies will fold. Farmers will demand and get more services from suppliers. More sophisticated approach will be required for marketers."

- And, finally, this pearl: "Your guess is as good as mine. Why should I give out valuable trade forecasts for free?"

Profile of Agribusiness Communicator

To round out my profile of the modern agribusiness marketer and communicator, I found that his median age is 45.4 years, he is probably married (95.0 per cent are), and he has three children. His favorite sports and hobbies, in order, are fishing, golf, football, hunting and shooting, gardening, reading, baseball, basketball, boating (including sailing and canoeing), and tennis. Unusual hobbies included taxidermy, hooking rugs, gem polishing, refinishing furniture, knitting by machine, and rodeo. Three slaves listed "work" as their hobby, and one wag bragged, "girls."

Helpful Comments

The marketers and agri-communicators were given a chance for the last word under "comments you think might help this study." Here are a few:

• “Not enough ag marketers actually **know** any farmers or dealers. Too many of us spend too much time in our offices guessing at what the farmer thinks, instead of getting out there and finding out, **first-hand**.”

• “Reliable, detailed, timely sources of information are desperately needed now; more so in the future. The 1969 Census of Agriculture published in 1971 and 1972 is not the answer!”

• “I am quite concerned about companies that over-sell their products through our sources of information. This includes our universities when they sell products in exchange for grants.”

• “Impress on academic leaders that our current technology surpasses our ability to communicate. They should be preparing more promising students for selling/communicating, etc., instead of attempting to direct them toward Ph.D.’s and the academic/research world.”

• “Since you’re going to report to AAACE, I want to comment on ag college editing. The standards set by extension and experiment station administrators and editors are too low. Even given good content, the layout, writing, and production aren’t appealing to farmers and businessmen, with a few states as exceptions.”

• “Extension communicators need to get out more with farmers and agribusiness people, raise their quality, even at the expense of quantity. We need exchange programs where extension editors work briefly in ad agencies, farm industry, state papers, etc. I think commercial men would welcome a chance to cooperate in this.”

• “On-the-job training for ag journalism students needs expansion. It would yield summer income for students and provide a source of manpower for media, etc. Perhaps journalism schools should bring in more guest lecturers from agribusiness to get closer classroom contact with the working world. Many faculty members are out of touch with commercial ag journalism.”

• “Teach your ag graduates to **write!**”

• “Stress ‘knowing’ your audience and material. Then, accurately reporting timely, pertinent data with good, simple illustrations. Political bias, propaganda, and controversial topics outside of modern agriculture should be omitted. The material needs freshness and applicability.”

Here are some tall orders. Are YOU prepared to fill them?

References

- (1) BATES, R. Letter dated March 30, 1971.
- (2) COLEMAN, W. C. Letter dated March 31, 1971.
- (3) DAVIS, J. H. AND R. A. GOLDBERG (1957). *A Concept of Agribusiness*. Division of Research, Graduate School of Business Administration, Harvard University. Boston.
- (4) "FARM & POWER EQUIPMENT READER & MARKET PROFILE." (Rev. September 1969). FARM & POWER EQUIPMENT, St. Louis, Mo.
- (5) HARDIN, C. M. Speech delivered at American Feed Manufacturers Association Convention, Chicago, Ill., June 9, 1971. U.S. Department of Agriculture, Office of the Secretary.
- (6) HOFFMAN, E. J. Letter dated April 22, 1971. Also, "The Retail Farm Supply Market," a special report from FARM STORE MERCHANDISING. The Miller Publishing Company, Minneapolis, Minn. May 1970.
- (7) JONES, FRED I. Unpublished research. 1971.
- (8) MANCHESTER, A. C. "Wholesalers and Brokers: Buyers by the Carload." The Yearbook of Agriculture 1969: *Food For Us All*. U.S. Department of Agriculture. United States Government Printing Office, Washington, D.C.
- (9) "MARKETING AMERICA'S FOOD." (October 1970). ERS-446. Economic Research Service, U.S. Department of Agriculture.
- (10) "PROFILES OF THE EQUIPMENT DEALER." (1969). IMPLEMENT & TRACTOR, Kansas City, Mo. Intertec Publishing Corp.
- (11) ROY, E. P. (1967). *Exploring Agribusiness*. Department of Agricultural Economics and Agribusiness, Louisiana State University, Baton Rouge, La. The Interstate Printers & Publishers, Inc., Danville, Ill.
- (12) "A SURVEY OF LAWN-GARDEN-HARDWARE-HORSE AND PET ITEMS." FARM SUPPLIER (March 1969). Issued by Research Section, Watt Publishing Co., Mount Morris, Ill.