



A Guide for New Manufacturers

Grocery Retailers in the Northwest

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Grocery Retailers in the Northwest

Grocery retailing is a big business that impacts every American. Retailers at the end of the food distribution channel greatly influence the food manufacturers at its beginning. Grocery retailers often are the only face that consumers see in the food distribution channel; thus, they are the most powerful gatekeepers between food manufacturers and consumers. One of the greatest challenges for food manufacturers is to sell new products to retailers.

This publication covers how retailers work, what they look for in new products, and how they select new products. It highlights retailers in the Northwest and offers words of wisdom from several of them. This information will help new food manufacturers as they begin distributing to retailers or expand distribution to larger retailers.



Retailers in the Northwest¹

The Northwest is a great place for grocery retailing. The Portland–Vancouver region ranks 20th among U.S. grocery markets, with food sales of more than \$4.3 billion in 2005. In the Portland area, the largest grocery retailers in 2003 were Safeway, Fred Meyer, Quality Food Centers, Albertsons, and WinCo. Independent retailers accounted for about 12 percent of the retail grocery market.

Table 1. Key players in the Portland, Oregon retail grocery market.

Retailer	Banner	Number of stores	Market share (percent)	
Safeway, Inc.	Safeway, Inc.	86	30.5	30.5
Kroger, Inc.	Fred Meyer	44	22.2	} 24.2
	Quality Food Centers	8	2.0	
Independents	—	81	11.9	11.9
SuperValu (2006)	Albertsons, Inc.	38	11.1	11.1
WinCo Foods	WinCo Foods	13	8.3	8.3

¹Overview of the Retail Grocery Market in the Pacific Northwest United States, Agriculture and Agri-Food Canada, December 2005.

Table 2. Key players in the Seattle, Washington retail grocery market.

Retailer	Banner	Number of stores	Market share	
			(percent)	
Safeway, Inc.	Safeway, Inc.	118	27.4	27.4
Kroger, Inc.	Fred Meyer	38	11.9	} 25.2
	Quality Food Centers	78	13.3	
Independents	—	137	12.7	12.7
SuperValu (2006)	Albertsons, Inc.	59	12.1	12.1
Haggen, Inc.	Haggen	9	2.1	} 2.1
	Top Foods	15	4.7	

The Seattle–Tacoma–Bellevue, Washington, area is ranked 10th among American grocery markets, with food sales of more than \$7.2 billion in 2005. The largest grocery retailers in this region in 2003 were Safeway, Fred Meyer, Quality Food Centers, Albertsons, and Haggen, Inc. Independent retailers account for over 12 percent of the retail grocery market. Haggen, a relatively small, family-owned grocery chain, holds a significant market share, at 6.8 percent.

Fred Meyer, owned by Kroger, Inc., has an extensive presence in the Northwest. Kroger also owns Quality Food Centers, Food 4 Less, and Smith’s Food & Drug Stores, all located in the Northwest, as well as several other retailers throughout the country. Kroger is one of the largest grocery retailers in the U.S., with over \$60 billion in annual sales. Safeway and Albertsons are the other large national supermarket chains in the Northwest.

The Pacific Northwest is home to more than 25 percent of all natural food stores in the U.S. Northwest consumers are more conscious of health and social issues than most and are educated about the foods they eat (Agriculture and Agri-Food Canada).

Whole Foods and Wild Oats are medium to large retailers nationwide that focus on natural and organic products. Aggressively adding stores each year, Whole Foods currently has one store in Portland, with three more planned for Portland and one for Eugene. Whole Foods has stores in Seattle and Bellevue, Washington, with three more planned for Seattle and one for Redmond.

Wild Oats, a publicly traded company based in Boulder, Colorado, has 113 stores and buys more than 7,200 locally produced food items from 3,500 farmers, artisans, and manufacturers in every state. Wild Oats has six stores in Oregon and one in Washington. In July 2006, Wild Oats Market launched a campaign aimed at supporting local farmers and producers. “Choose Local” tags



identify locally supplied products, and some tags also carry a producer profile (“Wild Oats Urges Customers to ‘Choose Local’”).

Several independent grocery chains operate in the Northwest, and the number increases each year. In 2003, there were 137 independent grocery retailers in Washington and 81 in Oregon. These retailers include Haggen, Zupan’s, Market of Choice, Red Apple, and New Seasons Market.

The Northwest also is home to many food cooperatives. There are 10 in Oregon and 10 in Washington (Tables 3 and 4). Idaho has two grocery cooperatives, one in Boise and one in Moscow.



Table 3. Oregon grocery cooperatives.

Cooperative	Location
People’s Food	Portland
Oceana Natural Foods	Newport
Grower’s Market	Eugene
Food Front	Portland
First Alternative	Corvallis (2)
Coos Head Food Store	North Bend
Brookings Natural Foods	Brookings
Ashland Food	Ashland
Alberta Co-op Grocery	Portland
Astoria Co-op (A Community Store)	Astoria

Source: Cooperative Grocery website (www.cooperativegrocer.coop).

Table 4. Washington grocery cooperatives.

Cooperative	Location
The Food Co-op	Port Townsend
Sno-Isle Natural Foods	Everett
Skagit Valley Food	Mount Vernon
Community Food	Bellingham
Ferry County	Republic
Central Co-ops Madison Market	Seattle
Okonagan River Natural Foods	Tonasket
Olympia Food	Olympia
Olympia Food East	Olympia
PCC Natural Markets	Fremont, Greenlake, Issaquah, Kirkland, Seward Park, View Ridge, West Seattle

Source: Cooperative Grocery Online (www.cooperativegrocer.coop).

The Northwest also is home to various alternative retail stores, including convenience, club, warehouse, and specialty stores such as 7-Eleven, Dairy Mart, Costco, Wal-Mart, and Trader Joe's.

A path to retail sales²

While many new manufacturers dream of selling their products in major retail chains across the country, the path to that goal isn't always direct. Retailers, large and small, agree that it usually is best to start small and work your way up to the big players. This progression allows you to gain experience, learn how to play the game, and build production and delivery capacities.

While large retailers are attractive due to their sheer volume of sales and number of store locations, they aren't always the best choice for a new manufacturer. Many retailers state that they support local farmers and manufacturers, but usually only local, independent retailers (including food cooperatives) make this a top priority. These stores often are the best starting point for new businesses.

In the Northwest, fortunately, many small, independent grocery retailers and cooperatives passionately support new, local food businesses, realizing that their customers want local food products. These retailers usually have fewer product requirements, making it easier for new manufacturers to enter the market. Starting in a local independent market or food cooperative is a great way to "test the waters" with a new product; retailers often receive feedback from customers and give advice to the manufacturer.

Retailers in the Northwest that pride themselves on being entry points for new, local food manufacturers include Market of Choice, Zupans, New Seasons Market, and Haggen. Zupan's is known for being a gourmet market and a great place to introduce new, local food products.

Food Front Cooperative in Portland sees many new food businesses get their start in food cooperatives. Grocery manager Gary Koppen claims "We're the place to bring new products." Koppen suggests that starting with a cooperative allows the manufacturer to work with the retailer, work out the kinks, and get feedback from the retailer and customers, all at substantially lower financial risk than that incurred when supplying larger stores (Koppen).

Food Front is a cooperative made up of about 2,900 members and is part of a group that includes local cooperatives such as Alberta's and People's. If a product gets placed in one of these stores, it usually can be

²The following retailers were interviewed for this publication: Albertsons, Food Front Cooperative, Fred Meyer, Haggen, Market of Choice, and New Seasons Market.

placed in the others. Supporting local farmers and manufacturers is part of their mission. Food Front looks for local, successful, and sustainable farm products. Many new and local products are identified with a bright tag indicating that the product is “new” or “locally produced.”

With the exception of wine and beer manufacturers, Trader Joe’s is not necessarily the best place for new manufacturers to get placement. Trader Joe’s is a unique store that has 80 percent private label products. Although they take on new products every year, once products are deemed successful, they usually are converted to private label. While this can be a viable source of income for manufacturers, it isn’t a place to grow name and brand recognition. Trader Joe’s carefully guards the names of their manufacturers.

How retailers work

Retailers, like brokers, distributors, and manufacturers, are running a business. They want to purchase successful products that will sell well. They want to stock products that their customers demand. They want a good deal and to make a decent, if not sizeable, margin.

Most retailers are looking for the same thing: a unique product. A big draw is convenience items, but organic and natural items, as well as gluten-free products, also have wide appeal.

Purchasing is done by buyers or category managers, depending on the size of the retailer. Larger retailers have category managers who purchase and maintain products in their category or categories for many stores. Buyers and category managers deal with many people and have a good understanding of what their customers want. They decide which products will be placed on store shelves, purchase products from distributors and manufacturers, and work with brokers. Some chains have centralized purchasing for all stores. For example, Albertsons makes all product purchasing decisions at their headquarters in Boise, Idaho.

When approaching a retailer, it is important to know whom to contact.³ After doing initial research via the Internet or other sources, call the retailer to get the name and contact information for the buyer or category manager. If the retailer has a corporate office, call this office first before contacting individual stores. The buyer usually will ask you to send samples, product literature,



³See Appendix B, “Contact information for retailers in the Northwest.”



and ingredient lists. It is extremely important to follow up with your contact. (Wiese).

Timing is important. Large retailers usually look at new products during specific times of the year. The category manager can tell you this schedule. Albertsons, however, does not follow a specific schedule except for new items. An appointment can be made at any time with the category manager in Boise, and decisions are made the second week of each month (Shields).

Many retailers like to purchase from a primary distributor who can supply a majority of their products for a department. This limits the costs associated with each delivery and invoice. Some retailers also purchase directly from manufacturers for direct store delivery (DSD).⁴

Distributors purchase products from manufacturers and sell and transport them to retailers. Some distributors also monitor retailers' shelves, take orders, and show new products to retailers. (See *Using Food Distributors in the Northwest: A Guide for New Manufacturers*, EM 8923.)

Brokers act as sales representatives for the manufacturer. They make sales calls, accompany manufacturers on store visits, place product on shelves, do in-store demos, and place promotional activities in stores. Brokers usually work closely with retailers to promote products. (See *Using Food Brokers in the Northwest: A Guide for New Manufacturers*, EM 8922)

New product introductions: Requirements and costs

Requirements for new products differ, depending on the retailer. Usually, the larger the retailer, the more requirements it will have. Most require the basics: insurance, business license, production in a licensed facility, and UPC codes. Others, such as Fred Meyer, have technology requirements such as Electronic Data Interchange (EDI) and case dimension compatibility with inventory-receiving technology. Most retailers have promotional budget requirements and expect to see a promotional plan before considering a product. Smaller retailers may not have packaging, label, or technology requirements that larger retailers have. Most will require in-store demonstrations, and they often prefer to see the product early on and have input on packaging (Taylor).

While most retailers prefer that a product be placed in all of their stores, some make exceptions for local products. For example, Albertsons has

⁴Direct store delivery is when the manufacturer delivers products directly to the store.

allowed local manufacturers and producers in southern Oregon to supply their southern Oregon stores. These items do not have to go through their distribution center in Portland, but can be delivered directly to retail stores. These products usually already have been sold through other retailers in the region and have a loyal following (Corral, Shields, Withers).

Investigate requirements before approaching a retailer. The “Retailer research worksheet” (Appendix C) will help you research potential retailers. You can obtain some information on the Web, while other information can be obtained only by calling company headquarters or by asking during sales meetings. Appendix A lists some useful retailer websites. Some sites include information for vendors. Appendix B contains contact information for retailers in the Northwest.

Shelf space

Product placement is key when marketing products. Not only is placement in the right region and store important, but where your product is placed on the shelf can have a big impact on its success. Cereal is a prime example: retailers commonly place sugary cereals on the lower shelves to attract the attention of children. Healthier cereals go on higher shelves where adults will see them (Koppen, Mattox).

Large retailers often determine where products will be placed. Placement may be negotiable, but it might be difficult for the retailer to adjust placement due to agreements with other manufacturers. Smaller independent retailers might be more able or willing to work with you on placement, but they still might have limited flexibility. You’ll need to present good reasons for an alternative placement.

Keep in mind that a quick way to get a retailer to reject a product is to have packaging that doesn’t fit the retailer’s shelves. While retailers may prefer unique labels, they will want packaging that is similar to present products and that will easily fit on their store shelves.

Slotting fees

Slotting fees are fees that retailers charge manufacturers to place their products on the shelf. They are more common among large supermarket chains. In most cases, slotting fees are charged per item per store. These fees are nonrefundable if the product is not successful and is pulled from the shelves. Some Northwest retailers that use slotting fees are Fred Meyer, Albertsons, Safeway, WinCo, Haggen, and QFC. Interestingly, Wal-Mart and Trader Joe’s do not charge these fees.

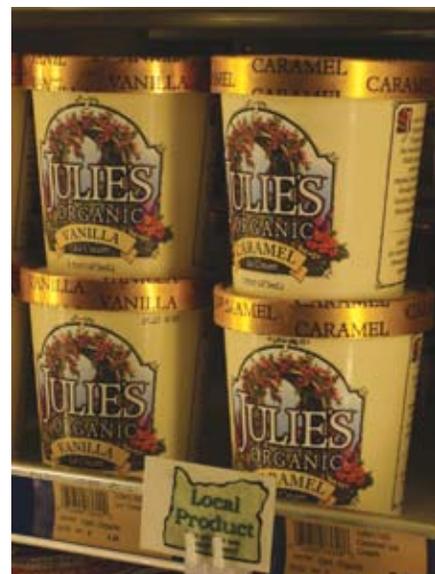


Table 5. Range of slotting fees.

Retailer category	Rate range
Small to medium-size retailer	\$60–\$100 per store per item
Large chain retailer (more than 100 stores)	\$100 per store per item
Flat fees	\$500–\$8,000

Source: A Northwest food broker (anonymous).

Large chain retailers usually require manufacturers to stock all stores and charge a slotting fee of up to \$100 per item per store. Thus, fees can quickly add up to more than \$10,000 per item. Some retailers charge one rate for the first item and a reduced rate for additional items. Other large chains charge a flat rate for the whole chain. These fees can range from \$500 to \$8,000, plus free cases per store. In most cases, retailers also require a specific amount of free goods, either in lieu of or in addition to a cash fee (anonymous Northwest food broker).

New manufacturers often cannot afford to pay the slotting fees charged by large retailers. While many retailers claim that slotting fees are negotiable, some form of payment usually is required. In some cases, the use of a distributor can significantly reduce these fees (Wiese). Fortunately, small, independent retailers usually don't charge slotting fees.

Costs of promotion

Also consider the cost of promotional activities. Most retailers have promotional options, and some require participation. Most retailers say they do not require manufacturers to pay for promotional activities; however, they usually will not take on a product unless the manufacturer has a promotional plan and sufficient funds budgeted for it.

Promotional activities can include coupon books, in-ad coupon inserts, weekly ads, display programs, and product demonstrations/tastings. Independent local retailers sometimes put products in ads for free, especially in the case of seasonal items or products on temporary price reduction from the manufacturer. More often than not, however, a fee is charged for these activities.

The cost of these activities varies greatly. It may cost a few hundred dollars to be included in a monthly advertisement. Large retailers have extensive promotional options that can range in price from \$2,000 to \$15,000 for placement in a coupon book or \$750 to \$8,000 for placement



in a weekly advertisement. Fred Meyer will not promote products unless they are carried in all 128 stores. Promotional materials are the same for all stores and must include only items that are in all stores (Wiese).

One of the best ways to promote a new product is to give in-store product demonstrations. Most retailers either require or strongly encourage manufacturers to conduct demonstrations for their customers. Retailers such as Fred Meyer and New Seasons Market have their own demonstration department. Fred Meyer allows only their own staff to give in-store demonstrations (Wiese). Other retailers allow manufacturers, their representatives, or outside demonstration companies to conduct demos. Smaller retailers, such as Food Front Cooperative, require new manufacturers to conduct demos when introducing a new product (Koppen).



Pricing

One of the biggest complaints from retailers about dealing with new manufacturers is in regard to pricing. Many new manufacturers do not understand pricing and how it affects their profit and the retail price. Duran Taylor, natural foods manager at Market of Choice, recommends that you work backwards from the retail price to calculate your unit price. Include all costs and your own profit margin goals (Taylor). See *Food Distribution Channel Overview: A Guide for New Manufacturers* (EM 8921) for more information.

It is hard to obtain pricing and markup information. Markups vary by store and product category. Generally, the more competitive the product category, the lower the margin. Specialty, perishable, and lower volume items have higher margins. Many large retailers have private label products. In this case, no matter how low your price is to the retailer, it almost never will be as low as the private label price.

Some retailers require an introductory price when taking on a new product. For example, if a product is first offered at a temporary price reduction (TPR), Market of Choice will automatically place it in all seven of its stores. Otherwise, the manufacturer must obtain authorization from the corporate office and then sell to each location (Taylor). Other retailers, such as Albertsons, do not recommend using a TPR initially. They prefer to introduce products at the normal price. They don't want consumers to try a product and then see the price increase (Corral, Shields, Withers).



Working with retailers

The relationship you build with a retailer is crucial. Retailers are a great resource for manufacturers. They sell to the end consumer and know what their customers want. You and your retailers have common interests: you both want the products in the store to succeed. When a product sells well, it benefits both you and the retailer and meets the demands of the retail customer.

As much as a product's characteristics and quality are important, so are the promotional plans to support it. A great product placed on a shelf won't go anywhere without promotional activities, whether they be advertisements or in-store demonstrations.

Work closely with your retailer to find the right activities to promote your product (Wiese).

Retailers want manufacturers to work with them in the long run. They want you to follow up with them often and, most importantly, to follow the agreed-upon promotional plan (Wiese). Communication is extremely important. You need to have open communication with your retailers, stick to agreed-upon delivery schedules, and keep retailers up to date on pricing changes and production fluctuations.

Retailers working with new manufacturers voice several concerns. The most common of these are the following:

- Inability to supply all stores
- Not sticking to the agreed-upon promotional plan
- Inability to supply the volume required by stores
- Not following up with the retailer after the initial sale
- Inability to acquire and use technology
- Inability to resupply stores quickly when needed
- Not conducting in-store demos
- Not understanding how pricing works; pricing products well above the competition

Northwest retail buyers and category managers give the following advice on how to get products carried in retail stores. (The contact information for these retailers is listed in Appendix B.)

Food Front Cooperative: Do your homework! Never sacrifice quality. Research packaging and use a less expensive package. Have a plan and do demos.

Fred Meyer: Be persistent, flexible, and honest; have integrity. Listen to your category managers and follow up with them. If you can't deliver, don't say you can. We want products to be successful.

Albertsons: Don't overprice. Have a business model and promotional plan. Know what is happening in your category.

Market of Choice: Do your homework: research the market and your consumers. Understand markups and how they affect your profit and the final retail price. If necessary, change the size of your package to get a more competitive price. Be active in promoting your product in the store. Follow up frequently with the retailer. Don't be afraid to share your product or ideas in the early stages.

New Seasons Market: Learn about what we have and spend time in our store.

Haggen: Be flexible. Build relationships with retailers and be prepared to work for the long haul. If your product is not accepted, follow up with the category manager and find out why.

A common message from these retailers is to do your homework. You will always benefit from doing a little research on each retailer. Most have websites, and larger retailers post vendor/supplier information such as vendor handbooks, lists of requirements, technology information, and manufacturer profiles on their sites (see Appendix A).



Summary

When selling to retailers, you'll never have the same experience twice. Although commonalities exist, each retailer has its own buying process and requirements. With some, it is very difficult to get face time, while others are eager to take on new, local products.

Large retailers may charge slotting fees and require expensive promotional activities. Smaller retailers may have no fees or promotional activity requirements and may be more willing to support a new local food business.

The most common path is to start small, grow, evolve, and eventually set sights on large retail chains. Along the way, your business, your product, and your goals may change. View retailers as resources to help you reach your goals, for they know the customer. Building a good relationship with retailers will improve your chances of success.

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Appendix A. Useful websites

Safeway supplier information

www.safeway.com/suppliers/usa/hbook/hbook.asp

Includes information about becoming a supplier, setup requirements, product changes, ongoing policies, accounting, etc.

Albertsons supplier information

supplier.albertsons.com

Includes new supplier application, vendor diverter, procurement operating policies, code of practice, and technology information. Also contains links to a contact directory and frequently asked questions.

Fred Meyer supplier information

www.fredmeyer.com/b2b.htm

Offers information on Scan-on Receiving requirements, in-store cooking schools, EDI, vendor art requirements, presentation logos, etc.

Market of Choice

www.marketofchoice.com

Covers information about the store, its history, and its mission, as well as information about each department.

New Seasons Market

www.newseasonsmarket.com

Covers general information about the store and its services and activities.

Zupan's Market

www.zupans.com

Offers information about the store's services, departments, and locations.

Haggen, Inc.

www.haggen.com

Provides information about the company and lists weekly ads and specials.

The Food Alliance

www.foodalliance.org

Designed to help farmers, producers, and market partners. Lists food cooperatives throughout the country that are members of the alliance.



Food Front Cooperative

www.foodfront.coop

Details the history and mission of the cooperative.

Wild Oats Market

www.wildoats.com

Offers an inquiry request section. Check out their new “Choose Local” program.

Cooperative Grocery: for retailers and cooperators

www.cooperativegrocer.coop

As natural food co-ops’ only national trade magazine, this site provides a venue through which “our best retailers and cooperators” can share ideas and practices on operations, governance, and strategy.

Appendix B. Contact information for retailers in the Northwest

Albertsons, Inc.

Northwest Division store support center
17001 NE San Rafael
Portland, OR 97230
Kit Shields: Regional executive manager
Phone: 503-251-9519
E-mail: kit.shields@albertsons.com
Hala Corral: Regional executive manager
Phone: 503-251-9526
E-mail: hala.walker@albertsons.com

Food Front Cooperative

2375 NW Thurman St.
Portland, OR 97210
Gary Koppen: Grocery manager
Phone: 541-222-5658, ext. 124
E-mail: gary@foodfront.coop
Tom Mattox: Marketing director
Phone: 541-222-5658, ext. 133
E-mail: tom@foodfront.coop

Fred Meyer

P.O. Box 42121
Portland, OR 97424-0121
Kevin Wiese: Category manager, grocery
Phone: 503-757-5675
E-mail: kevin.wiese@fredmeyer.com

Haggen, Inc.

P.O. Box 9704
Bellingham, WA 98227-9704
Emily Brummel: Director of general merchandise
Phone: 360-739-5555
E-mail: emilyb@haggen.com

Market of Choice corporate office

25 West 25th Ave.
Eugene, OR 97405
Duran Taylor: Natural foods manager
Phone: 541-345-0566, ext. 119
E-mail: Durant@marketofchoice.com

New Seasons Market

1954 SE Division St.

Portland, OR 97209

Jerry Lohgry: Assistant grocery merchandiser

Phone: 503-292-1987

E-mail: jerryl@newseasonsmarket.com

Zupan's Market

7223 NE Hazel Dell Ave.

Vancouver, WA 98665

Mike Zupan: Co-owner and purchaser

Phone: 360-737-2728, ext. 2

Appendix C. Retailer research form

Retailer name

Headquarters address

Phone

Fax

Website

Years in business

Number of stores

Category manager

Store buyer

Contact e-mail

Contact phone

New products are considered/viewed (date)

Product requirements

Slotting fees

Marketing programs

Distribution methods

Primary distributors

Recommended by

Form/contract requirements

References

Comments

For more information

Food Distribution Channel Overview, EM 8921

Using Food Brokers in the Northwest, EM 8922

Using Food Distributors in the Northwest, EM 8923

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Visit the Food Innovation Center website at **fic.oregonstate.edu/**

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