

TIMES & TRENDS

A Snapshot of Trends Shaping the CPG Industry

SUSTAINABILITY 2007

CONSUMER-FOCUSED CPG GROWTH OPPORTUNITIES



December 2007

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EXECUTIVE SUMMARY

- ▶ A majority of leading CPG manufacturers and retailers have supply-chain sustainability programs in place, but consumer-focused initiatives are in the early developmental stages
- ▶ The consumer market for sustainable products and packaging is viable and growing; one-fifth of U.S. consumers are “sustainability-driven” in their product and store selection
- ▶ Consumers aged 55 and over have a higher tendency to be sustainability-driven; products offering sustainability benefits have enjoyed rapid growth among high-purchase categories within this segment (eg. coffee, personal care, pet care)
- ▶ The sustainability-driven segment follows distinct shopping patterns that have shifted as retailers implement more consumer-focused sustainability programs; both the grocery and supercenter channels earned sizable share gains this year
- ▶ Major CPG retailers and manufacturers are beginning to tap into consumer-focused growth opportunities in five key areas: organic products (the most widely-developed area to date), eco-friendly products, eco-friendly packaging, fair trade products and sustainability marketing



INTRODUCTION

A viable consumer market has emerged for sustainable CPG products and packaging.

Sustainability -- meeting the needs of today without compromising the ability of future generations to meet their own needs -- has evolved from buzzword to guiding business principle with the power to literally reshape the CPG and retail industries.

85% of leading CPG retailers and manufacturers now have sustainability programs in place, with a majority focusing on recycling and energy conservation.¹

Powerful forces are driving this change: recognition of an urgent need to protect the environment, substantial cost savings, major retailer requirements and impending legislation.

Add to this list a new emerging force that will fuel further change and will take the sustainability movement in new directions: the consumer.

As detailed throughout this report, a viable consumer market has emerged for sustainable CPG products and packaging.

A number of major CPG retailers and manufacturers have recognized this potential and have entered markets previously dominated by niche manufacturers and specialty and online retailers.

Exceptionally high growth rates among organics, eco-friendly products and packaging and fair trade products will stimulate further product development. In addition, competitive pressure from retailers with a strong sustainability positioning, including Wal-Mart and Tesco, will drive additional sustainability focus among retailers.

Industry players with successful products and positioning in this space today will likely enjoy a first mover competitive advantage.

This report explores the consumer sustainability market and opportunities to grow topline sales among CPG manufacturers and retailers.

1. Sustainability: Balancing Opportunity and Risk in the Consumer Products Industry; Deloitte/GMA/FPA



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CONSUMER DEMAND SUSTAINABILITY-DRIVEN CONSUMERS

One-in-five U.S. consumers are “sustainability-driven” in brand and store selection.

A just-released IRI survey of over 22,000 U.S. consumers found that roughly half consider at least one sustainability factor when selecting brands to buy or stores to shop. These factors include organic development, eco-friendly ingredients, eco-friendly packaging and fair treatment of suppliers and employees.

Each of these factors individually is important to one-fifth or more of consumers – a sizable market by any measure.

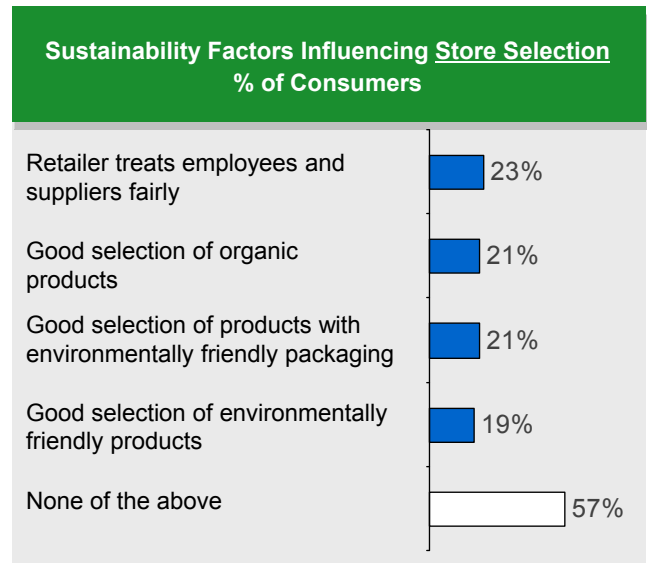
Among these factors, organic benefits have the broadest appeal currently. This is likely a result of the fact that organic products are also considered healthier, and there is now wide availability of organic food, beverages and personal care products in mainstream channels.

By contrast, increased focus on “green” and “fair trade” products and practices has been relatively recent. In addition, these products are not as widely available in mass market outlets.

As highlighted in these findings, sustainability issues are impacting shopping and purchase decisions to some extent among a high proportion of consumers; however, roughly one-in-five consumers is “sustainability-driven,” citing at least two of the factors as key influences in brand selection and at least two in store selection. These consumers are important target segments to consider in consumer-facing sustainability initiatives.



Source: IRI Sustainability Survey; 22,267 respondents



Source: IRI Sustainability Survey; 22,267 respondents

Sustainability-Driven Consumers
Cite at least two sustainability factors as key influences in brand selection (top chart) and at least two in store selection (bottom chart.)



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SUSTAINABILITY-DRIVEN CONSUMERS DEMOGRAPHIC CHARACTERISTICS

Older Boomers and smaller households have particularly high representation within the sustainability-driven segment.

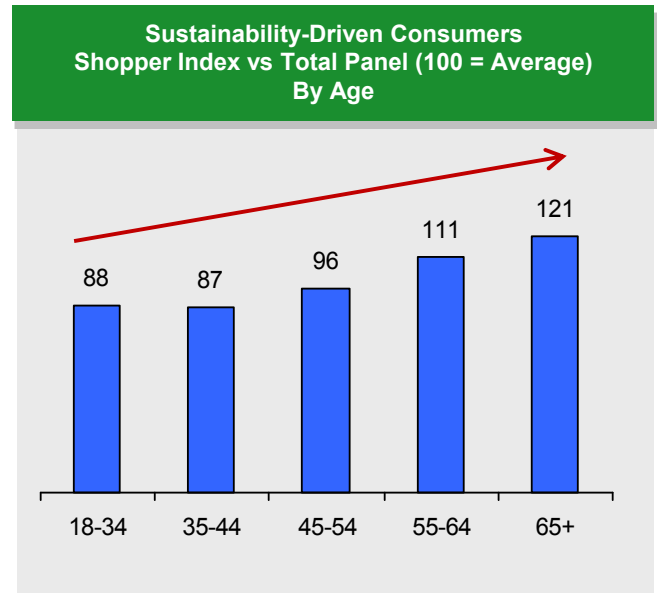
Young adults are often considered to be the most “tuned in” to sustainability issues. But in fact, sustainability concerns sweep across generations.

And, older consumers are actually more likely to consider multiple sustainability factors in their shopping and purchase decisions than their younger counterparts.

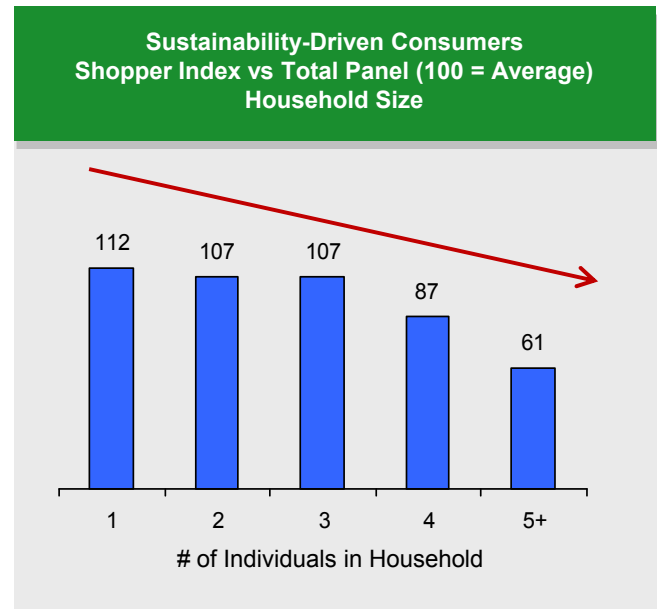
Presumably, these consumers have the budget to afford sustainable products – many of which are priced at a premium, and the time to locate them, as not all are readily accessible.

As highlighted throughout this section, several manufacturers and retailers have successfully tapped into this market, but others who target the 55+ segment may be missing a big opportunity.

Household size also plays a role. Sustainability-driven households skew towards smaller households. Several factors are likely at play here. Larger households tend to be more budget constrained, so price may be trumping sustainability. Further, more wants and needs must be taken into account, potentially diluting the sustainability influence.



Source: IRI Consumer Network™, Sustainability Target Groups (See definition on page 4)



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SUSTAINABILITY-DRIVEN CONSUMERS CHANNEL PREFERENCES

Shopping patterns among sustainability-driven consumers are shifting as retailers increase availability of sustainable products and programs.

Shopping patterns of sustainability-driven consumers do differ somewhat from other consumers, referred to as “sustainability neutral” in the chart below.

Specifically, sustainability-driven consumers allocate a higher share of spending to drug stores and a lower share to supercenters – consistent with the shopping patterns of Boomers and older consumers.

As retailers implement more consumer-focused sustainability initiatives, channel shifts are evident, and future shifts are probable.

Over the past year, for instance, the grocery channel secured sizable share gains among sustainability-driven consumers. The broader availability of organic products within grocery stores is likely a key contributing factor.

While supercenter gains within this segment were slightly below gains among “neutrals”, they were significant, particularly on a lower share base. Major sustainability programs and awareness campaigns, at Wal-Mart in particular, are likely having a positive influence.

On the flip side, while drug stores are well-developed within this segment, retailers within this channel should explore the viability of an increased assortment of organic and “green” products and other sustainability programs to protect and grow share.

CPG Dollar Share by Channel by Sustainability Segment				
Channel	2007 Share		Point Change vs 2006	
	Sustainability-Neutral	Sustainability-Driven	Sustainability-Neutral	Sustainability-Driven
Grocery	55.8%	56.0 %	+0.0	+0.6
Supercenter	14.0%	10.7%	+0.6	+0.4
Mass	8.8 %	9.3%	-0.6	-0.3
Club	7.8%	7.8 %	+0.1	+0.3
Drug	5.7%	6.3%	+0.4	-0.1
Dollar	1.2%	1.5%	0.0	-0.3

Source: IRI Consumer Network™; 52 weeks ending 10/21/07 and same period prior year
See page 4 for definition of “sustainability-driven” segment



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Beer, wine, and spirits are among food and beverage categories with strong sustainable market potential.

SUSTAINABILITY-DRIVEN CONSUMERS HEAVILY-PURCHASED CATEGORIES: FOOD & BEVERAGE

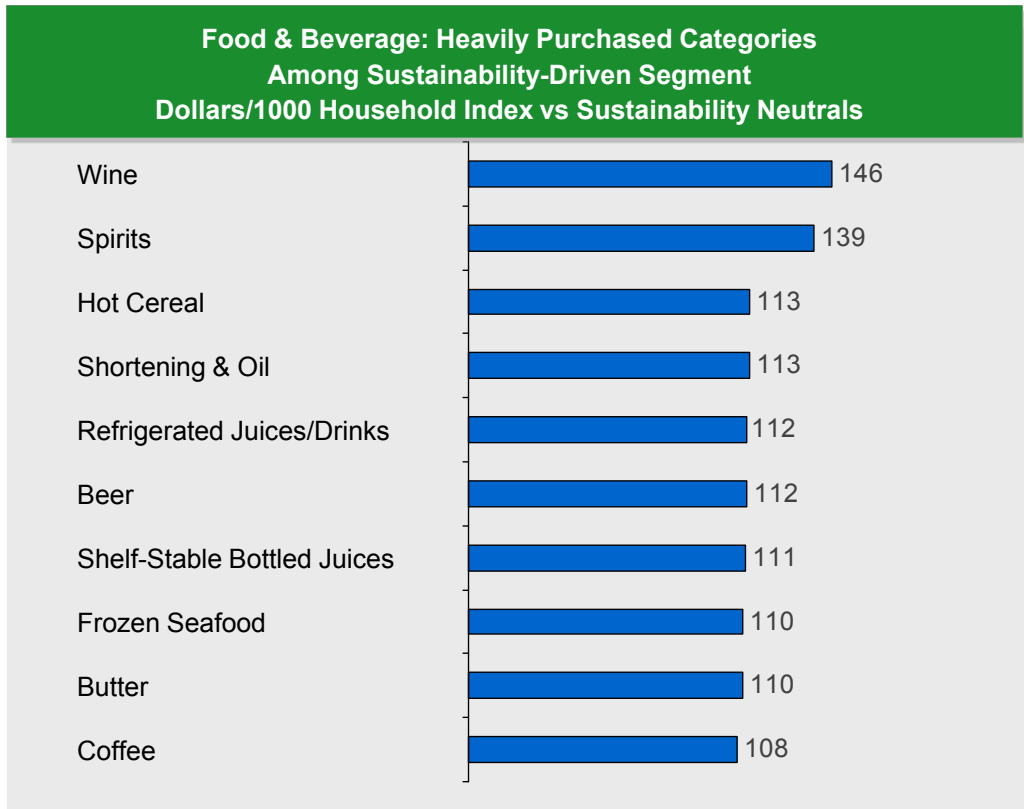
Consumers within the sustainability-driven segment have high purchase indices among a number of food and beverage categories.

These categories represent strong potential for products, packaging and marketing related to sustainability benefits.

Manufacturers are taking notice. Within wine, for instance, while organic wines were historically the domain of small wineries, most major wineries now also engage in environmentally-friendly farming.¹

Organic beer and spirits brands are also becoming more common. Anheuser Busch, for instance, offers organic Stone Mill Pale Ale. And, the company has announced plans to offer a super-premium organic vodka, Purus.²

Sustainability issues have been a significant factor in product development and marketing within coffee, as well, over the past several years. Sales of organic, fair trade coffee, for instance, grew 94% last year.³



1. Wine News
2. Advertising Age, 11/27/07
3. fairtrade.net

Source: IRI Consumer Network™; 52 weeks ending 10/21/07 and same period prior year
See page 4 for definition of "sustainability-driven" segment



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Products with sustainability benefits are increasingly available among key pet care and personal care categories.

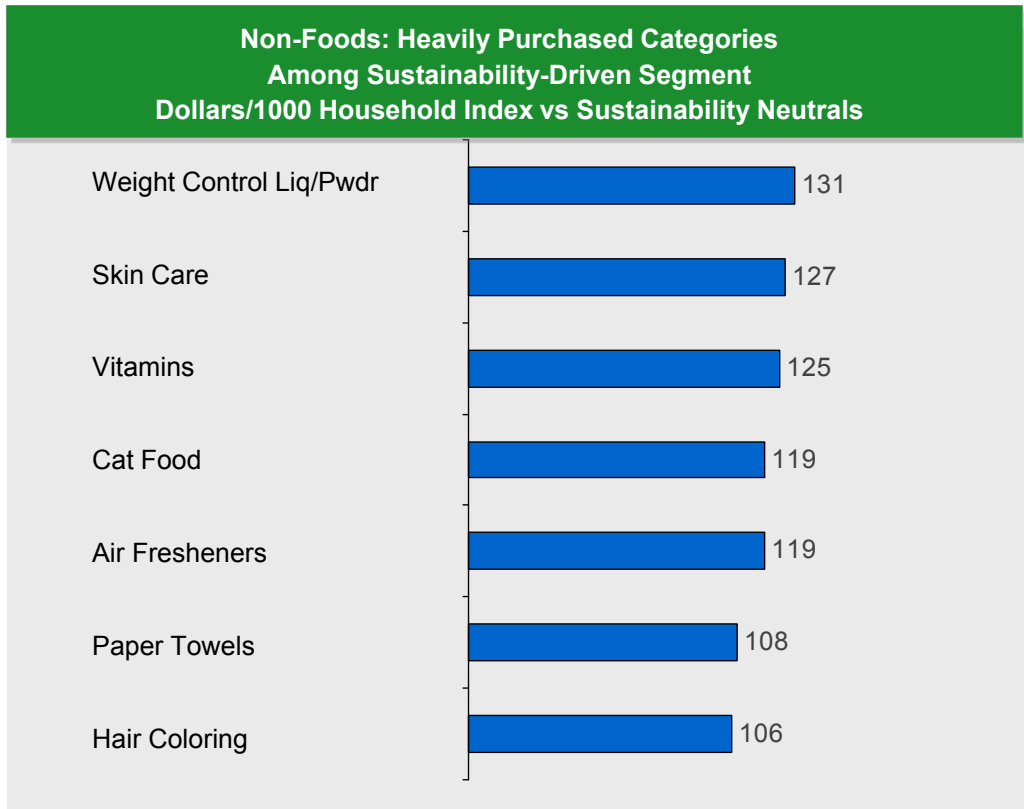
SUSTAINABILITY-DRIVEN CONSUMERS HEAVILY-PURCHASED CATEGORIES: NON-FOODS

Among non-food categories, sustainability-driven consumers display above-average purchase propensities across a range of categories, as highlighted below.

Within these categories, interest in sustainability products and practices will likely be particularly strong. While there is increased availability of green and organic alternatives across these categories, the most rigorous development has been in personal care and pet care.

Natural personal care products, for instance, have been growing at 9% annually, attracting major manufacturers such as Clorox (Burt's Bees acquisition) and L'Oreal.

Natural/organic pet food sales increased an estimated 36% last year, and major manufacturers, including Nestle Purina, Iams and Hills now offer products in this market.² Wal-Mart, too, has introduced a private label organic pet food line called Natural Life.



1. Clorox Press Release
2. Organic Trade Association

Source: IRI Consumer Network™; 52 weeks ending 10/21/07 and same period prior year
See page 4 for definition of "sustainability-driven" segment



CPG MARKET OPPORTUNITIES OVERVIEW

Sustainability will become a source of competitive advantage for early movers.

With sustainability playing a significant role in product and store selection for one-fifth of consumers, and an influencing factor for one-half of consumers, there is now a viable market for sustainable products, packaging and positioning within the CPG industry.

As this market is in the early stages of development, sustainability will become a source of competitive advantage for early movers – particularly when multiple benefits are offered, such as superior or comparable performance to existing brands, better taste, health and wellness, cost savings or unique packaging.

This section outlines specific growth opportunities for CPG manufacturers and retailers and provides examples of sustainability initiatives that are already underway across the areas outlined below:

Sustainable Products

Sustainable product opportunity within the CPG industry is emerging in three key areas:

- **Organic:** Benefitting from a dual positioning of “better-for-you” and “better-for-the environment”, organic products continue to experience solid growth.
- **Eco-Friendly:** In categories with chemically-based products, such as laundry detergents and cleaning supplies, eco-friendly alternatives are a small, but rapidly growing market segment.

Sustainable Products (Cont'd)

- **Fair Trade:** Products guaranteeing a fair price paid to producers are increasingly available in mainstream channels and are growing substantially; key categories include coffee, tea and cocoa.

Sustainable Packaging

Across the CPG industry, companies are exploring ways to reduce, reuse and recycle packaging materials. A significant proportion of consumers is looking for eco-friendly packaging, yet, most of the positive changes are invisible to consumers. Concentrated laundry detergent is a highly visible alternative that is quickly gaining share.

Sustainability Marketing

Sustainability marketing is fraught with challenges— principally consumer skepticism and lack of understanding. Yet, it is critical to capturing market potential. This section will offer guidelines on how to strike the necessary balance in consumer communications.



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GROWTH OPPORTUNITIES ORGANIC PRODUCTS

Organic product sales are benefiting from the dual “better-for-you” and “better-for-the-environment” positioning.

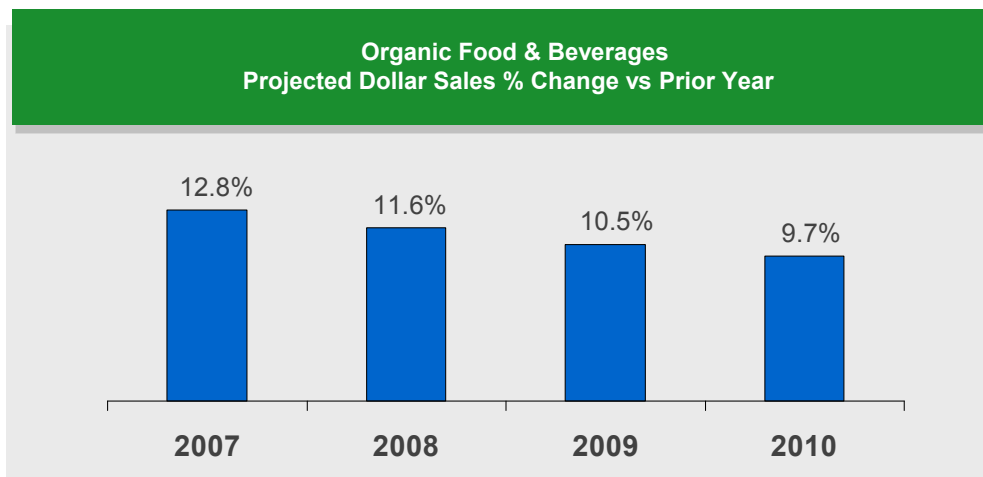
As highlighted previously, among all of the sustainability factors addressed in this study, organic has gained the most traction. Thirty-nine percent of consumers consider organic benefits when selecting food and beverage brands.

Further, organic products are projected to experience sustained high growth for the next several years.

A major factor behind the success of organic products is that consumers perceive these products as offering dual benefits: a recent Harris Interactive poll found that roughly three-quarters of consumers believe organic food is better for the environment, and roughly the same proportion believe that organic food is healthier than non-organic.

And, while the organic market was comprised primarily of niche players just a few short years ago, major players are building a strong presence. Kraft, for instance, has organic versions of numerous products, from Wheat Thins to Chips Ahoy. ConAgra recently acquired Alexia Foods, and organic market leaders Cascadian Farm and Muir Glen are owned by General Mills. Leading retailers have also assumed a major stake in this market through organic private label lines.

Organics are achieving solid growth among non-food categories, as well. Major players are tapping into the growth trend – largely through acquisition, as evidenced by Clorox’s recent purchase of Burt’s Bees, L’Oreal’s purchase of The Body Shop, and Colgate Palmolive’s majority stake in Tom’s of Maine.



Source: Nutrition Business Journal



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Niche players have been the primary drivers and beneficiaries of eco-friendly household product growth.

GROWTH OPPORTUNITIES ECO-FRIENDLY PRODUCTS

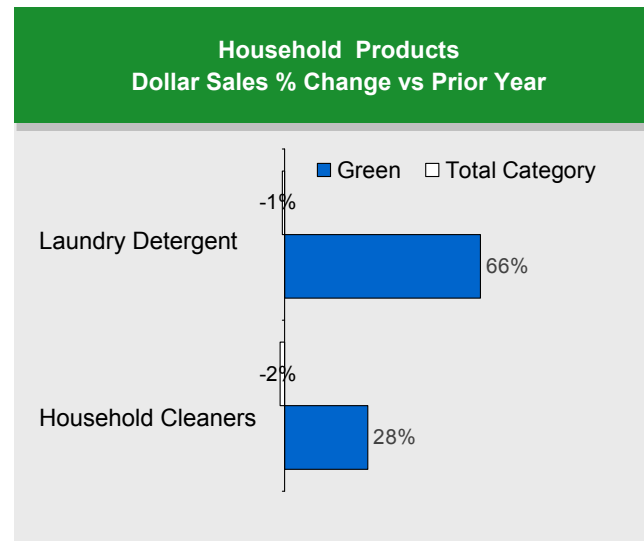
With nearly one-quarter of consumers actively looking for products that are inherently better for the environment, and one-fifth selecting stores based in part on the availability of these products, there is a sizable opportunity emerging – particularly among categories that are chemical-based, such as laundry detergent and household cleaners.

Demand is growing for products that are biodegradable, non-toxic, and plant-based.

Over the past year, green laundry detergent product sales increased 66%, while the category was essentially flat, and green household cleaners grew 28% in a category that declined 2% overall. However, the green market is still very small, representing less than 2% of the total market in both categories.

To date, niche players have been the primary drivers and beneficiaries of this growth wave. One of the largest players in this space, Seventh Generation, for instance, has seen sales growth of 25% - 40% per year for the past few years.¹

But now, major manufacturers are investing in the development of green products with comparable performance to the products consumers have used and trusted for years.



Source: IRI InfoScan® Reviews;
52 weeks ending 11/4/07 and prior year

For example, Clorox is introducing a new line of natural cleaning products that will be available nationwide in January 2008. Clorox Green Works™ is made from plant-based ingredients, including coconut and lemon oil. The products are biodegradable and have recyclable packaging.

CPG retailers are challenged with not only offering the right assortment of eco-friendly products by market, but also face new competitors. Home Depot, for instance, recently rolled out their Eco Options line of 2,500 products, from cleaning supplies to water-conserving washing machines.

1. USA Today, 11/26/07



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GROWTH OPPORTUNITIES FAIR TRADE PRODUCTS

Fair trade products are penetrating mainstream markets.

One-in-five consumers indicate that fair treatment of employees and suppliers is an important consideration when selecting brands and stores.

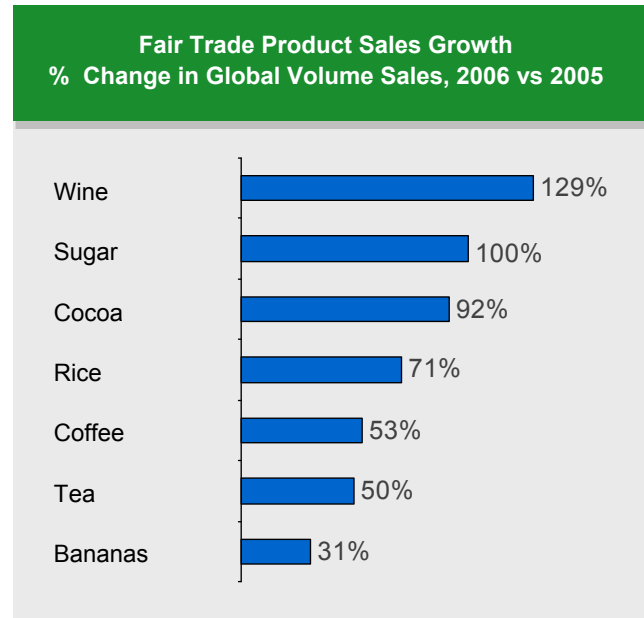
These sentiments are fueling demand growth for “fair trade” products, which guarantee that a fair price was paid to producers.

The market is still relatively small. Fair trade products only account for 0.5% - 5% of sales in product categories with a fair trade presence.¹ But, the market is growing rapidly. Sales in 2006 increased 41% worldwide versus prior year.²

And, growth is spreading across numerous categories, from sugar to bananas, as outlined in this chart.

U.S. retailers are beginning to tap into fair trade growth potential in select categories. Both specialty and traditional grocers, including Wild Oats, Whole Foods, Publix, Shaw's, Stop 'n' Shop, Trader Joe's, Safeway and Kroger now offer a range of fair trade products.

Sam's Club sells seven fair trade imports, and now offers fair trade coffee under its Member's Mark label.³ Costco converted its private label Kirkland Signature brand to fair trade certified Starbucks' beans.⁴



Source: Fairtrade.net

On the manufacturer side, fair trade products are primarily the domain of niche players, but recent initiatives among major manufacturers suggest that the market may be transforming. Both Sara Lee and Nestle, for instance, use fair trade chocolate in some of their products.⁵ Hershey's recently purchased Dagoba, a premium chocolate player offering organic and fair trade products.⁶

1. wikipedia.com
2. fairtrade.net
3. New York Times, 10/2/07
4. Business Wire, 4/10/06
5. Courier-Post, 4/15/07
6. Chicago Tribune, 2/13/07



GROWTH OPPORTUNITIES ECO-FRIENDLY PACKAGING

The shift to more eco-friendly packaging is most visible in laundry detergent today but will extend across categories.

Across the CPG industry, companies are exploring ways to make packaging more environmentally friendly by reducing the amount of material used and leveraging materials that are recycled, recyclable and biodegradable.

In addition to being better for the environment, many of these changes will also drive major cost savings due to reduced transportation and material costs.

Momentum in the shift to more sustainable packaging has been bolstered by Wal-Mart's Packaging Scorecard, which enables manufacturers to benchmark their packaging on a number of sustainability factors versus other packaging in the category. Wal-Mart will begin to use the scorecard as a consideration in vendor selection in February 2007 and has set a goal of reducing packaging by 5% by 2013.

Yet, much of the momentum in sustainable packaging is invisible to consumers. With 29% of consumers considering the environmental benefits of packaging in brand choice, there appears to be a substantial opportunity in communicating these benefits more prominently.

Laundry detergent is one area in which packaging changes have been highly visible. With P&G and Unilever leading the charge, concentrated laundry detergents in significantly smaller packages now comprise 11% of the market, versus only 2% a year ago, per chart.

The trend towards concentrated detergents and smaller packages is clearly not a fad or niche offering: Wal-Mart, who represents one-quarter of category sales, recently announced that the company will sell only concentrated liquid laundry detergents in the U.S. by May 2008.¹

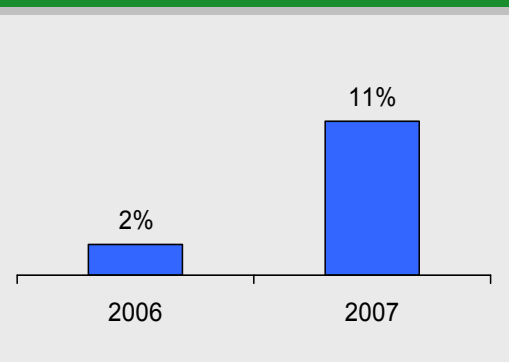
Easily-noticeable changes will likely get the most play with consumers initially, and as concentrated products require significantly less packaging, we will see more categories taking this approach – household cleaning products may soon follow suit.

And, reduced packaging may have an additional benefit to consumers: lower prices. Deutsche Bank analyst William Schmitz is predicting that laundry concentration will reduce per-load prices by an average of 10%.²

“Wal-Mart’s move to sell only concentrated liquid laundry detergent will save 400+ million gallons of water, 95 million pounds of plastic resin and 125 million pounds of cardboard.”

– GreenBiz.com

2X-3X Concentrated Liquid Laundry Detergent as % Total Category Sales



Source: IRI InfoScan® Reviews; 52 weeks ending 11/4/07 and prior year

1. walmartfacts.com
2. Advertising Age, 10/1/07



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GROWTH OPPORTUNITIES SUSTAINABILITY MARKETING

Consumer skepticism and lack of understanding present challenges in sustainability marketing.

Marketing sustainable products, packaging and practices poses unique challenges – chief among them consumer skepticism and lack of understanding.

As outlined in the chart below, a high proportion of consumers do not believe environmental claims and are looking for more information to help them make eco-friendly choices.

Yet, several companies are overcoming these hurdles and are successfully leveraging sustainability as a marketing platform.

Wal-Mart is a prime example. The sheer expanse of Wal-Mart’s sustainability program, encompassing the company’s own environmental footprint, as well as that of suppliers and consumers, and the establishment and reporting of measurable goals, have appeased even the toughest skeptics.

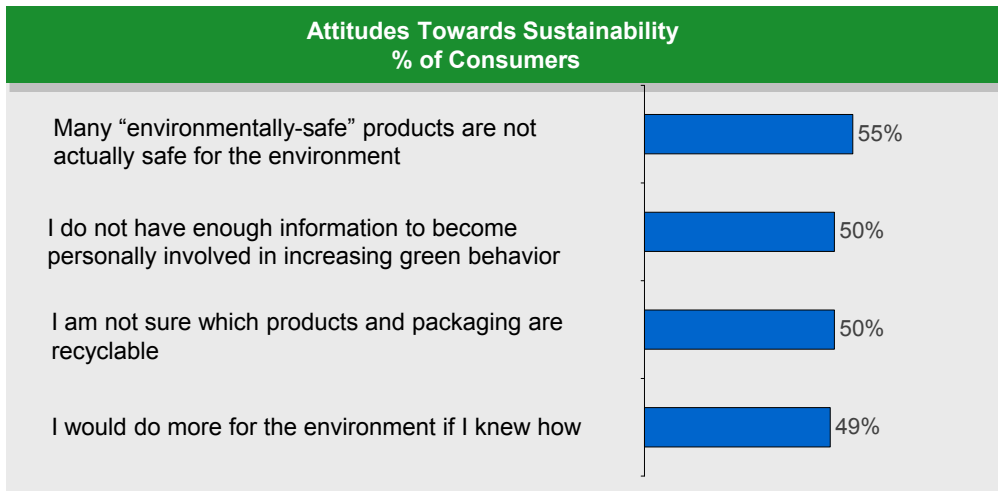
Treehugger.com, for instance, reporting on Wal-Mart’s Sustainability Summit, indicated, “This was a major event, with serious green content way beyond PR fluff.”

Sustainability Marketing Guidelines

- Obtain endorsement from well-respected organizations (eg. EcoLogo, Green Seal, TransFair)
- Market specific sustainability benefits, avoiding the general term “sustainability.” A recent Hartman Group study found that only half of consumers are familiar with the term and most of these consumers cannot define it.
- Set concrete, measurable goals (eg. Wal-Mart’s goal, which was surpassed, to sell 100 million compact fluorescent light bulbs this year.)
- Highlight personal benefits to consumers (eg. health and wellness, cost savings) in addition to the environment
- Offer sustainable programs with high consumer visibility. For example, offer cloth bags and convenient recycling of plastic bags.

“Green already has become the marketing platform of choice for thousands of companies, among them General Electric, Wal-Mart, BP, S.C. Johnson, Honda and DuPont.”

–Advertising Age, 4/30/07



Source: GfK Roper Consulting Green Gauge® Report (PR Newswire, 8/22/07)



CONCLUSIONS

CPG MANUFACTURERS

Manufacturers seeking to tap into consumer-focused sustainability market potential should consider the following action items:

- ▶ Explore new product development opportunities
 - Assess market potential of new products with sustainability benefits (ie organic, eco-friendly, fair trade) within your categories and target markets
 - Short-term opportunity will be strongest among categories with a high purchase index among sustainability-driven consumers (eg. coffee, wine, spirits, pet food, skin care) and those with chemical-based ingredients
 - Consider new distribution sources (eg. specialty stores, online retailers) for sustainable products in addition to traditional mass market outlets
 - Evaluate full competitive set (ie including established niche players) before launch

- ▶ Explore sustainable packaging options
 - Identify opportunities to reduce packaging and leverage recycled, recyclable and biodegradable materials; get ahead of impending regulations and retail partner requirements
 - Implement packaging changes that are easily visible to consumers, wherever possible
 - Clearly communicate all significant sustainable packaging enhancements on package labels

- ▶ Build sustainability marketing campaigns
 - Ensure that all sustainability claims are well-documented and measurable
 - Highlight specific benefits and avoid the term “sustainability” in consumer communications
 - Stress comparable or superior performance to existing leading brands in addition to sustainability benefits
 - Emphasize personal benefits, in addition to environmental/social benefits (eg. health and wellness, cost savings, performance) to reach a broader audience beyond core “sustainability-driven” consumers



CONCLUSIONS CPG RETAILERS

Retailers seeking to tap into consumer-focused sustainability market potential should consider the following action items:

- ▶ Explore new product development and assortment opportunities
 - Assess market potential of new private label products and expanded assortment of branded products with sustainability benefits (ie organic, eco-friendly, fair trade)
 - Tailor assortment by market, focusing on markets with a high mix of “sustainability-driven” consumers, who have strong representation among consumers aged 55 and over

- ▶ Explore sustainable packaging options
 - Identify opportunities to reduce packaging and leverage recycled, recyclable and biodegradable materials among private label products
 - Increase availability of products with sustainable packaging
 - Plan for shelf-space optimization as package size is reduced – particularly among categories that have or are likely to dramatically shrink package size as products become more concentrated (eg. laundry detergent, cleaning supplies)
 - Clearly communicate all significant sustainable packaging enhancements on package labels and store signage

- ▶ Build sustainability marketing campaigns
 - Ensure that all sustainability claims are well-documented and measurable
 - Highlight specific benefits and avoid the term “sustainability” in consumer communications
 - Educate consumers regarding the personal, environmental and social benefits of sustainable products, packaging and programs through store signage and literature, websites, advertising
 - Consider a broad competitive set in marketing initiatives, including specialty retailers, online retailers and other non-traditional competitors (eg. Home Depot)



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RESOURCES

To gain insight into consumer-focused sustainability opportunities across specific brands, categories, consumer segments, channels or retailers, contact your IRI client service representative regarding custom analyses leveraging the following resources:

IRI Consumer Network™

Nationally representative panel of households tracking purchases with hand-held barcode scanners; extensive demographic profiles enable in-depth analysis of purchase behavior across standard or custom-defined consumer segments across channels.

IRI AttitudeLink™

IRI's custom survey capability that can be executed via mail, telephone or Internet; the ability to link attitudes with actual purchase behavior enables clients to track sales across custom attitudinal segments.

IRI Sustainability Target Groups

With the new **IRI Sustainability Target Groups**, CPG manufacturers and retailers now have the ability to analyze the shopping and purchase behavior among consumers whose decisions are impacted by sustainability considerations.

Available target groups include:

- “Sustainability-driven” consumers, highlighted in this report, who consider multiple sustainability factors (see page 4 for definition)
- Custom target groups based upon consumer propensity to consider any specific sustainability factor (organic, eco-friendly products, eco-friendly packaging, fair trade) or combination of factors in brand or store selection.

For additional information, please contact:

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MORE INFORMATION

Please contact Sheila McCusker at sheila.mccusker@infores.com with questions or comments about this report.

ABOUT IRI

IRI is the world's leading provider of consumer, shopper, and retail market intelligence and insights supporting 95 percent of the FORTUNE Global 500 consumer packaged goods (CPG), retail and healthcare companies. Only IRI offers the unique combination of integrated market information, automated and predictive analytics, innovative enabling technologies, and domain expertise. With IRI, leading retailers and manufacturers are able to quickly discover breakthrough insights driving smarter decisions and actions across the enterprise for breakthrough results. Companies around the world depend on IRI for improved productivity, stronger brands, and dramatic revenue growth. For more information, visit <http://www.infores.com>.



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