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RODRIGO LOURENÇO FARINHA

**ADVANCE TOWARDS A BUSINESS-TO-FARMER MARKETING:
A PERSPECTIVE FROM FARM INPUT COMPANIES**

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de Mestre em Administração de Empresas.

Linha de Pesquisa: Estratégias de Marketing

Orientador: Prof. Dr. Leandro Angotti
Guissoni

Coorientador: Prof. Dr. Marcos Fava Neves

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Banca examinadora:

Prof. Dr. Leandro Angotti Guissoni
(Orientador)
FGV-EAESP

Prof. Dr. Marcos Fava Neves
(Coorientador)
FGV-EAESP

Prof. Dr. Delane Botelho
FGV-EAESP

Prof. Dr. Luciano Thomé e Castro
Purdue University

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ABSTRACT

The agribusiness industry has changed dramatically in the past decades. The advent of the professionalization of the farmer and consolidation across the industry has changed marketing practices and resource allocation of farm input companies. Whereas the relationship was made only with a few farmers, now it is possible to observe investments to increase the touchpoints and develop a relationship with a mass market. In this context, business-to-farmer (B2F) marketing has emerged as a key managerial practice in the field by companies, who are embracing the different aspects of the farmer if compared to a traditional business. However, a few are known about what characterizes B2F marketing and whether this concept sustains in the marketing literature. This study attempts to advance toward this definition and subsequently discusses how the so-called B2F marketing has been used by agribusiness managers. In order to explore this topic, a perspective from farm input companies was chosen due to the lack of scholarly insights. Five semi-structured interviews were organized with executives from different farm input companies. The results of this study point out that B2F marketing can be recognized as a particular dimension of marketing, different than the B2B and B2C marketing. While companies dealing with farmers need to worry about generating value before, during, and after the farm processes and operations, considering the functional aspects of the farm business, the emotional and social aspects of the farmer may as well be a part of the B2F marketing. The study of this topic is relevant to both marketing academics and practitioners. Regarding academia, this study aims to propose a framework to analyze B2F marketing. To practitioners, this study is valuable to input companies, dealers, and co-ops as it aims to clarify the marketing strategies of companies that deal directly with farmers.

Keywords

Agribusiness, Business-to-farmer, Marketing strategy, Exploratory study

RESUMO

O setor do agronegócio mudou drasticamente nas últimas décadas. O advento da profissionalização do produtor e consolidação em todo setor modificou as práticas de marketing e os recursos alocados pelas empresas de insumos agrícolas. Se antes o relacionamento era feito apenas com alguns produtores, agora é possível observar investimentos para aumentar o contato e desenvolver o relacionamento com todo o mercado. Nesse cenário, o business-to-farmer (B2F) marketing surge como uma prática gerencial chave das empresas no campo, que estão trabalhando com os diferentes aspectos do produtor se comparado com um negócio tradicional. No entanto, pouco se sabe o que caracteriza o B2F marketing e se esse conceito se sustenta na literatura de marketing. Esse estudo tenta avançar para essa definição e discutir como o chamado B2F marketing tem sido utilizado pelos profissionais nesse mercado. Para explorar esse tópico, uma abordagem exploratória foi escolhida devido à escassez de informações na literatura. Cinco entrevistas semi-estruturadas foram organizadas com executivos de diferentes indústrias de insumos. Os resultados deste estudo apontam que o B2F marketing pode ser reconhecido como uma dimensão particular do marketing, diferente do B2B e B2C marketing. Enquanto empresas lidando com produtores precisam se preocupar em gerar valor antes, durante e depois dos processos e operações da fazenda, considerando os aspectos funcionais do negócio, os aspectos emocionais e sociais do produtor também devem ser parte do B2F marketing. O estudo desse tópico é relevante para a literatura e prática de marketing. Considerando a literatura, este estudo propõe um framework para analisar o B2F marketing. Para a prática, este estudo é valioso para empresas de insumos, revendas e cooperativas, uma vez que visa esclarecer as estratégias de marketing das empresas que lidam diretamente com o produtor.

Palavras-Chave

Agronegócios, Business-to-farmer, Estratégias de marketing e Estudo exploratório

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1. INTRODUCTION

1.1. Agribusiness and the Management Practices

Although Agribusiness is a broader concept, it can be characterized by the relationship between farmers and companies that collaborate during different stages such as planting, crop protection, harvest, and trade of farm commodities and items made from them (Davis and Goldberg, 1957). Over the past few years, farm input companies (FICs), such as BASF, Bayer and Syngenta, are increasing their attention and resources allocated to develop more robust marketing practices (ÉPOCA NEGÓCIOS, 2019; JORNAL DO COMÉRCIO, 2019; NOTÍCIAS AGRÍCOLAS, 2019). These practices would allow them to achieve a higher market share with their products sales (i.e., seeds, pesticides, herbicides, insecticides). An example of marketing practice to improve the companies' relationship with farmers is the implementation of loyalty programs. In those programs, from the purchase of specific input products, farmers are offered benefits ranging from goods for personal use (e.g., cellphones, TVs, travels) to assets for business use (e.g., training programs, equipment, consulting) (ORBIA, 2019). Another example is related to distribution strategies. Over time agricultural dealers have become increasingly important in making products available to farmers, and FICs have to balance direct sales to farmers and indirect sales through dealers. Furthermore, these companies have to balance marketing push activities towards those dealers and marketing pull towards farmers. An example of marketing push is the incentives offered to dealers, such as rebates, inducing them to push specific products to farmers (AGRODISTRIBUIDOR, 2013). At the pull activities, the investments in relationship and communication target a mass-market of farmers (BAYER, 2019; ORBIA, 2019; SYNGENTA, 2019).

Given the increasing importance of marketing practices in agribusiness, with a special focus on the farmer-input companies relationship, business-to-farmer (B2F) marketing has emerged as a key managerial practice in the field (AGRODISTRIBUIDOR, 2017; B2F, 2019). However, little is known about what characterizes B2F marketing and whether this concept sustains itself in the marketing literature. B2F marketing differs from traditional marketing along the business-to-business (B2B) and business-to-consumer (B2C) dimensions. At the B2B, while traditional marketing addresses the full range of value-generating relationships between businesses (LILIEN, 2016), B2F marketing targets the farmer in the role of managing the farm business (ZYLBERSZTAJN; NEVES; CALEMAN, 2014 p. 224). Furthermore, the farmer may

well not be the traditional manager of a business. The farm enterprise is characterized by a low degree of functional specialization allowing farmers to pursue non-economic goals, such as status and prestige, so far as the financial resources are adequate (KOOL, 1994). Therefore, B2F marketing may be related to B2B and B2C marketing in different ways. This study aims to discuss this development conceptually and subsequently discuss how the so-called B2F marketing has been used by agribusiness managers. The specific research questions are:

- (1) How does input suppliers recognize the B2F marketing?
- (2) What are the marketing practices of input companies with farmers that allows the advance towards a B2F marketing?
- (3) How the B2F marketing is different when compared to B2B and B2C marketing?

Three particular aspects motivate the choice of the Brazilian market as the context for this study. First, agribusiness is an essential industry for emerging markets. In 2018, this industry represented more than 25% of Brazil's GDP (CEPEA/CNA, 2019), more than 16% for India's GDP, more than 13% for Indonesia's GDP and more than 8% for China's GDP (THE WORLD BANK, 2019). Second, the Brazilian inputs market is one of the largest markets globally, representing almost 20% of all sales in 2018 (INFORMA, 2018). Third, dealers and farmers have gone through a series of changes in Brazil in the last five years, which may increase the relevance of the understanding of B2F marketing. For example, dealers have become more consolidated due to recent market mergers and acquisitions (BVMI, 2017; VALOR ECONÔMICO, 2017). Furthermore, the number of farms has been decreasing while their average size has been increasing (AGWEB, 2018). Some studies argue that farmland consolidation creates larger and better-managed farms, which are more productive and efficient (BCG, 2015; SUMNER, 2014).

The literature review provides a general view about the evolution of agribusiness marketing, and how traditional marketing literature defines and distinguishes the B2B and B2C marketing. Next, industry analysis is organized in order to understand the dynamics of the agribusiness industry in Brazil and its main characteristics. Then, based on the literature, semi-structured interviews are organized in order to scrutinize and answer the research question. Considering the lack of scholarly insights into the topic, this approach is used to investigate the nature of B2F marketing.

The study of this topic is relevant to both marketing academics and practitioners. Regarding academia, this study aims to contribute to the agribusiness literature, shedding light on the topic of B2F marketing. To practitioners, this study is valuable to FICs, dealers, and co-ops as it aims to clarify the marketing strategies of companies that deal directly with farmers.

This introduction is followed by the methodology, results, discussions, and conclusion. The managerial implications, limitations of the study, and some suggestions for further studies are presented in the discussion and conclusion sessions.

2. LITERATURE REVIEW

This section presents fundamental concepts with which this study was built. Two main topics are going to be discussed in this section with the following objectives:

- a) Agribusiness: the objective is to understand how the evolution of agribusiness marketing occurred and discuss critical areas, such as farmers' buying behavior and its main characteristics regarding the relationship between farmers and businesses.
- b) Marketing Applications in B2B and B2C: the objective is to identify the main characteristics of the B2B and B2C marketing and discuss the differences between these dimensions.

2.1. Agribusiness

The review of the agribusiness literature presents the main findings divided into three parts. First, it presents an overview of academic production globally. Second, it presents the most relevant studies internationally. The third part presents the most significant studies developed in Brazilian academia. The study of Brazilian literature is essential since the context of this study takes place in Brazil and given that the country is an important market for the agribusiness industry.

2.1.1. The Context of the Agribusiness Literature

The term agribusiness was coined by John Davis and Ray Goldberg in 1957 to describe

[...] the sum of all operations involved in the manufacture and distribution of farm supplies, production operations on the farm, and the storage, processing, and distribution of farm commodities and items made from them. (DAVIS; GOLDBERG, 1957).

Since then, the interaction between input industries, farms, food processors, and distribution channels is being considered by some researchers as a system that should be analyzed with an integrated approach (ZYLBERSZTAJN, 1995).

The work of Davis and Goldberg gave origin to “Agribusiness System Analysis” (ZYLBERSZTAJN, 2017). The central concept is based on the transformation of the

perspective of agriculture as a private sector to it becoming a part of a specialized interdependent system of agents that operate in interconnected industries (ZYLBERSZTAJN, 2017). In this concept, a small farmer and a large corporate farm are both parts of the system (ZYLBERSZTAJN, 2017). Thereafter, the study of agribusiness economics and management gained strength and various research topics were explored in literature, such as resource-based view, new institutional economics, transaction costs, property rights, value-chain (e.g., DE SOWA; BUSCH, 1998; MCCALLA; SCHMITZ, 1979; ZYLBERSZTAJN, 1995, 2005).

Hence the marketing literature, some authors have argued that agriculture has long been a context for innovation in marketing theory and practice (PRESS et al., 2014). However, when analyzing the top-ranked marketing journals, it is not common to find research articles where the agribusiness industry is the sole object of study. When searching for keywords such as “agriculture” and “agribusiness,” from 2009 to 2019, in four ABS 4* marketing journals, being Journal of Marketing, Journal of Marketing Research, Journal of Academy of Marketing Science, Marketing Science, and Journal of Consumer Research, 111 articles were found. However, these prior studies focused on the downstream of the food chain, such as sustainability, organic products, and consumer preference, rather than on the upstream, such as manufactures and farm relationships. Nevertheless, those topics have been studied by specialized journals such as the Penn State list of key agribusiness journals (PENN STATE UNIVERSITY LIBRARIES, [s.d.]) *Agribusiness: an international journal*; *Agricultural and Resource Economics Review*; *Agricultural Economics*; *Agricultural Finance Review*, *American Journal of Agricultural Economics*, *Applied Economic Perspectives and Policy*, *Food Policy*, *International Food*, and *Agribusiness Management Review*, *Journal of Agricultural and Applied Economics*, *Journal of Agricultural and Resource Economics* and *Journal of Food Distribution Research*.

2.1.2.The International Agribusiness Literature

Despite the existence of international specialized journals, farmer marketing is not a topic that has been exhaustively explored by literature. Harbor, Martin, and Akridge (2008) identify that most researches are dated. These studies, with research topics such as brand loyalty and buying behavior, started being developed during the 1950s and 1960s and were published through extension education departments or were contained within a Master’s or Ph.D. thesis (HARBOR; MARTIN; AKRIDGE, 2008). These works were reviewed by Funk (1972) in 1972.

In the 1970s and 1980s some studies can be found, such as the farmer behavior on broiler feed purchases (FUNK; TARTE, 1978), corn herbicides purchase (FUNK; VINCENT, 1978), tractor purchase (FOXALL, 1979), and fertilizing purchase (FUNK; DOWNEY, 1983). In the 1990s, Kool (1994) studied the buying behavior of Dutch farmers in the purchase of tractors and Gloy and Akridge (1999) segmented the commercial producers' marketplace for agricultural inputs.

More recently, several studies have recognized the scarcity of research regarding the farmers' business (HARBOR; MARTIN; AKRIDGE, 2008; MALAK-RAWLIKOWSKA; MILCZAREK-ANDRZEJEWSKA, 2016; PARK; MISHRA; WOZNIAK, 2014). However, analyzing the recently available body of literature, four primary areas of study that were developed in this context can be found: (1) farmers' behavior, (2) marketing channels, (3) farmers' relationship, and (4) market structure.

First, the farmers' behavior literature explores how farmers behave considering the need for their decisions regarding the purchase of products or services or selling the production. Considering the purchase behavior of farm products, several authors propose a different model based on farmer's size and behavior pattern in order to develop a market segmentation tactics (BOEHLJE; DOEHRING; SONKA, 2005; BORCHERS et al., 2012; FEENEY; BERARDI, 2013; ROUCAN-KANE et al., 2011). These models take into account different farming contexts such as capital items (ROUCAN-KANE et al., 2011), expandable products (BORCHERS et al., 2012), and seeds purchase (FEENEY; BERARDI, 2013). On the other hand, Bensemann and Shadbolt (2015) analyze the farmers' behavior in selling their products to food processing companies. Lastly, other authors study the determinants of decision-making. Foltz and Zeuli (2005) developed a model of purchasing choices to identify the determinants of local of purchase and O'donoghue et al. (2016) propose a system of farmers' decision-making.

Second, the marketing channels literature explores the roles and trends of marketing channels for farmers to purchase products and to sell farm production. Considering the purchase of products, some authors have studied the role of cooperatives to small farmers (GARNEVSKA; LIU; SHADBOLT, 2011; ORTMANN; KING, 2007). Others have studied the viability and trends of the e-commerce in agribusiness (LEROUX, 2001; MONTEALEGRE; THOMPSON; EALES, 2007). Additionally, Castro, Neves, and Akridge (2017) have researched the incentive

programs of input suppliers with distribution channels in the USA and Brazil. Lastly, considering the selling side of the farm, Park, Mishra and Wozniak (2014) have described elements that affect the performance of farms using direct-to-consumer strategies.

Third, the farmers' relationship literature study how farmers interact with product suppliers for the farm. In this setting, some authors have studied how farmers interact with input suppliers (MALAK-RAWLIKOWSKA; MILCZAREK-ANDRZEJEWSKA, 2016) and others have assessed the determinants of the loyalty of farmers with input suppliers (HARBOR; MARTIN; AKRIDGE, 2008).

Fourth, the market structure literature studies the future of farms in view of marketing consolidation. The authors in this area have studied the role of small farms globally, considering the trends in agriculture (HAZELL, 2005; WIGGINS; KIRSTEN; LLAMBÍ, 2010). Table 1 summarizes the international literature.

Table 1 – International Agribusiness Literature

Category	Authors	Results
Farmers behavior	Bensemman, J., & Shadbolt, N. (2015)	Selling behavior of lamb producers with processors
	Boehlje, M., Doebling, T., & Sonka, S. (2005)	Segmentation model based on behavioral characteristics
	Borchers, B., et al. (2012)	Buying behavior segments of commercial producers for expandable products
	Feeney, R., & Berardi, V. (2013)	Buying behavior segments for seeds purchase
	Foltz, J., & Zeuli, K. (2005)	Model of purchasing choices to derive the demand determinants of local purchasing
	O'Donoghue, C., et al. (2016)	Develop a Farm Financial Information System (FARMFIS) to assist farmer financial decision-making
	Roucan-Kane, M., et al. (2011)	Buying behavior segments of commercial producers for capital items
Marketing channels	Castro, L. T., Neves, M. F., & Akridge, J. T. (2017)	Compare the incentives program of crop protection companies in the USA and Brazil
	Garnevaska, E., Liu, G., & Shadbolt, N. M. (2011)	Identify factors for successful development of farmer cooperatives in China
	Leroux, N. (2001)	Discuss the future success of e-commerce in agriculture
	Montealegre, F., Thompson, S., & Eales, J. S. (2007)	Models the viability or success of e-commerce venture in agriculture
	Ortmann, G. F., & King, R. P. (2007)	Discuss the role of cooperatives in the access of small farmers to input suppliers
	Park, T., Mishra, A. K., & Wozniak, S. J. (2014)	Identify factors that affect the performance of farms using direct to consumer strategies
Market structure	Hazell, P. B. R. (2005)	Discuss the future for small farms globally
	Wiggins, S., Kirsten, J., & Llambí, L. (2010)	Discuss the future for small farms globally
Farmers relationship	Harbor, A. L., Martin, M. A., & Akridge, J. T. (2008)	The determinants of the farmer's loyalty for input products
	Malak-Rawlikowska, A., & Milczarek-Andrzejewska, D. (2016)	Elicit farmers' opinions on their cooperation with feed suppliers and confront them with farmers' actual behaviors

Source: Elaborated by the author

2.1.3. The Brazilian Agribusiness Literature

The Brazilian agribusiness literature is not reserved for specialized journals such as the international literature. However, similar to international studies, several studies can be found in conference proceedings, thesis and books, instead of scientific papers. The Brazilian agribusiness literature focuses on three main areas: (1) marketing strategies application, (2) farmers' behavior, and (3) marketing channels.

First, the marketing strategies application literature studies general marketing practices applied to agribusiness companies. This literature discusses how farmers, channels, and other agents employ marketing activities, such as the marketing mix, in their businesses. Some authors explore how the marketing practices are employed by the whole agribusiness sector (BATALHA; DA SILVA, 1995; CASAS; BACHA; CARVALHO, 2016; GIRARD, 2002; NEVES; CASTRO, 2003; ZYLBERSZTAJN; NEVEZ, 2000). Other authors have studied how cooperatives and dealers employ marketing strategies to reach the farmers (BRITO, 2005; DE MIRANDA et al., 2015; KOLYA; SCARPARI; MIZUMOTO, 2012; MARX, 2011). Lastly, some authors have explored how farmers employ marketing practices inside their farms (BOAS et al., 2004; MACHADO; CRISPIM, 2016; MALHEIROS, 2013; MARX, 2011; SCATENA; DUARTE, 2006).

Second, the farmers' behavior literature, similar to international studies, explores how farmers behave in view of the need for their decisions regarding the purchase of products and services. Most of the studies found describe the purchase behavior of farmers considering different settings, such as types of products (AGRÍCOLAS, 2014; ROSSI; NEVES; DE CARVALHO, 2004a, 2004b; SANTI; SALVE, 2005; SILVA; SCARE; CASANOVA, 2008) or types of farmers (D'ARAGONE et al., 2016; NETTO; DOS SANTOS; ALVES, 2016; SCARE; ANTOLINI, 2013). Other authors have explored the segmentation by lifestyle (HABERLI, 2006) and others the determinants of choosing an agricultural dealer (PITTOL; BORGES, 2013).

Third, the marketing channel literature, also similar to international work, explores the roles and trends of marketing channels for farmers to purchase products and to sell the farm production. Some authors study the marketing strategies for cooperatives and dealers (CASTRO, 2008; CÔNSOLI; DO PRADO; MARINO, 2011; FARIA, 2010; SILVA, 2012; ZYLBERSZTAJN, 1994). Other authors have studied the trends and changes of marketing channels in Brazil (NEVES; THOMÉ; BOMBIG, 2001; NEVES; WAACK, ROBERTO

SILVA; MARINO, 1998). Lastly, some authors have studied the commercial relationship between farmers and processing companies and retailers (PASCOAL et al., 2011), and others have studied the determinant factors for small farmers participating in the traditional marketing channels (LOURENZANI, 2005).

Table 2 summarizes the studies found in the Brazilian literature.

Table 2 – Brazilian Agribusiness Literature

Category	Title	Type	Result and Main Findings
Marketing	Zylbersztajn, Decio. Nevez, M. F. (2000)	Book	The authors analyze the general management of agribusiness companies
Strategies	Neves, M. F., & Castro, L. T. (2003)	Book	The authors investigate the general marketing practices for the agribusiness
Application	Kolya, F. D. C., Scarpari, H. S., & Mizumoto, F. M. (2012)	Conference Proceedings	The authors analyze the practices of agrichemical dealers and provide a recommendation.
	de Miranda, R. L., et al. (2015)	Conference Proceedings	The authors apply strategic planning to a cooperative in Brazil
	Batalha, M. O., & da Silva, A. L. (1995)	Paper	The authors discuss general marketing practices for the agribusiness sectors
	Boas, L. H. de B. V., et al. (2004)	Paper	The authors make a set of recommendations for the coffee farmers chain
	Scatena, L. M., & Duarte, R. G. (2006)	Paper	The authors find how farmers use crop protection products
	Casas, A. L. Las, Bacha, R. A. F., & Carvalho, C. M. E. (2016)	Paper	The authors discuss the marketing practices in Mato Grosso do Sul
	Feliciano, C. A., Brambatti, F. V., & Marsoli, G. F. (2019)	Paper	The authors discuss marketing practices inside the farm
	Girard, R. E. (2002)	Thesis	The authors discuss the marketing strategies of agribusiness in the soybeans market
	Brito, C. A. (2005)	Thesis	The authors discuss analyze how the marketing mix elements are used by a cooperative
	Marx, A. C. (2011)	Thesis	The authors analyze the impact of marketing strategies for a cooperative
	Malheiros, M. A. da C. (2013)	Thesis	The authors analyze the general marketing practices for sheep farming
Farmers	Santi, L. C., & Salve, M. B. (2005)	Conference Proceedings	The authors discuss the purchase behavior of farmers
Behavior	Haberli, C. (2006)	Thesis	The authors propose a segmentation method of farmers considering their lifestyle
	Silva, A. P. S., Scare, R. F., & Casanova, A. C. P. (2008)	Conference Proceedings	The authors analyze the purchase process of the farmers
	Rossi, R. M., Neves, M. F., & de Carvalho, D. T. (2004)	Paper	The authors analyze the purchase behavior of farmers
	Rossi, R. M., Neves, M. F., & de Carvalho, D. T. (2004)	Paper	The authors analyze the purchase behavior of foliar fertilizers
	Scare, R. F., & Antolini, L. S. (2013)	Paper	The authors analyze the purchase behavior of grains farmers
	Pittol, E., & Borges, G. da R. (2013)	Paper	The authors analyze the factors that influence farmers to choose agriculture dealers
	Agrícolas, W. A. D. E. D. (2014)	Paper	The authors analyze the determinant for purchase of crop protection products by farmers
	D'Aragone, R. R., et al. (2016)	Paper	The authors analyze the purchase behavior of input products of sugar cane farmers
	Netto, L. G., dos Santos, T. L., & Alves, Y. B. (2016)	Paper	The authors analyze the purchase behavior of small farmers
Marketing	Neves, M. F., & Waack, Roberto Silva; Marino, M. K. (1998)	Conference Proceedings	The authors analyze the general marketing practices for the sugar cane market
Channel	Neves, M. F., Thomé, L., & Bombig, R. T. (2001)	Conference Proceedings	The authors analyze the changes in the input markets
	Zylbersztajn, D. (1994)	Paper	The authors discuss the marketing strategies for cooperatives
	Faria, R. L. De. (2010)	Paper	The authors discuss the marketing strategies for a cooperative
	Pascoal, L. L., Vaz, F. N., Vaz, R. Z., & Restle, J. (2011)	Paper	The authors discuss the commercial relationship between farmers, processing companies and retailers
	Silva, F. P. (2012)	Paper	The authors analyze the role of tradings and dealers in the financing of farmers
	Lourenzani, A. E. B. S. (2005)	Thesis	The authors propose determinants of small farmers to participate in marketing channels
	Cônsoli, M. A., do Prado, L. S., & Marino, M. K. (2011)	Book	The authors investigate the distribution channel structure in the Brazilian inputs market
	Castro, L. T. (2008)	Thesis	The authors compare the incentives program of crop protection companies in the USA and Brazil

Source: Elaborated by the author

2.1.4. Attempts to Advance the Development of the B2F Marketing

Within the literature, the book by Alfen (2014) has defined five characteristics of the agribusiness industry that distinguishes it from traditional markets. These five characteristics suggest the need for targeted managerial skills and knowledge to promote effective operation within the sector. First, the food sector presents unique cultural, institutional, and political aspects, domestically and internationally. Food is essential to human life, and, therefore, a priority for all societies and governments. Furthermore, Food and its consumption patterns permeate the cultural practices of human societies, which are different across nations. The critical role of international trade requires the sector to be aware of these cultural differences (ALFEN, 2014, p. 52). Second, crop and livestock production has an ‘uncertainty’ arising from the underlying biologic basis. In agriculture, the forces of nature (e.g., weather and pests) create uncertainty even in modern agriculture. Therefore, industry managers need to understand specific marketing structures in order to accommodate this uncertainty (ALFEN, 2014, p. 52). Third, agribusiness suffers from alternative forms of political interventions across sub-sectors and nations. As discussed, food is a priority for society and governments. Therefore, issues such as food safety and food supply, are motivating forces for political interventions in the sector (ALFEN, 2014, p. 52). Fourth, due to institutional arrangements, the technology development process relies significantly in the public sector. Globally, major research investigations are pursued in both private and public institutions. Thus, different from other sectors, which developmental research is confined solely to either one type of sector, agriculture presents differing processes that are key for major advances in “technology” (ALFEN, 2014, p. 52). Fifth, the agribusiness industry has different “competitive structures” within its stages. At production, there is a large number of relatively small units, but, at the same time, many agribusiness firms are large and multinational in scope. These structures can have significant influences on competition within the industry (ALFEN, 2014, p. 52).

Previously, studies have mainly considered farmer’s behavior as a specific type of industrial behavior (BOEHLJE; DOEHRING; SONKA, 2005; FOXALL, 1979; HARBOR; MARTIN; AKRIDGE, 2008; KOOL, 1994; ROUCAN-KANE et al., 2011). The farmer buys products, such as inputs, to produce farm products, and the farmer’s motivation to purchase means of production is primarily based on the production of farm goods. (KOOL, 1994). However, some authors have argued that farmers can have some aspects of consumer behavior (FOXALL, 1979; HARBOR; MARTIN; AKRIDGE, 2008; KOOL; MEULENBERG; BROENS, 1997).

Kool (1994) argues that these similarities come from the structure of the farm business. The organizational context of a farm is different from industrial companies (KOOL, 1994). Farms are in general business without compartmentalization and formalized procedures, having a very informal buying center. Management is primarily the farmer's responsibility, and the labor is provided by the farmer, his family, and other employees. Therefore, most decisions are concentrated in a few individuals, and their personal behavior influences the consumer-like behavior of a farm.

Kool (1994) analyzes the farm business through the buying behavior of farms and divide it into three areas: (1) buying process, (2) buying structure, and (3) relationship with suppliers. First, Kool analyzes the buying process as a problem-solving process when the financial resources are limited. However, he argues that when the various alternatives meet the minimal functional requirements or when farmers perceive differences in functional criteria between acceptable choice alternatives, emotional and social criteria become decisive. Additionally, farmers may pursue non-economic goals, such as status and prestige, in so far as the financial resources are adequate. Therefore, emotional and social criteria can influence the farmer's buying process just as the functional criteria.

Second, Kool (1994) characterizes the buying structure as informal with a low degree of functional specialization. In this setting, the farmer is well informed about all aspects of the farm, and many buying roles are accumulated in one person, the farmer or the family members. Therefore, the decisions on the farm will be made individually or in small decision-making units.

Third, Kool (1994) characterizes the relationship of farmers with suppliers based on three arguments: First, generally, many farmers in the market yield low individual power in a face-off against the few suppliers. Second, these farmers are usually dependent on suppliers' advice and expertise. Third, the farm inputs cannot be customized to the specific needs of individual farmers. Therefore, Kool (1994) argues that individual farmers are generally faced with a relatively weak market position, and they may be loyal to suppliers but try to maintain switching costs low.

FOXALL (1979) argues that farmers can be susceptible to a range of social and psychological factors in their purchase decisions, being influenced by factors such as prestige, status, gifts, and desired group membership (FOXALL, 1979). The author also states that the farmer's

purchase can be affected depending on the type of purchase decision. For programmed purchase decisions (e.g., replacement of tractor), the purchase can be less influenced by non-economic factors than routine decisions (e.g., input products). For the latter, considerations of social status, prestige and interpersonal persuasions can affect farmer behavior (FOXALL, 1979).

HARBOR; MARTIN; AKRIDGE (2008) assumes another perspective to analyze the buying behavior process and split growers into two categories: small farms and large commercial farms. These authors argue that small farms behave like retail consumers and wield little individual market power. On the other hand, they argue that large farms can interact with companies in a more business-like manner, taking advantage of economies of scale and increased market access. Therefore, the relationship between companies and small farms could be categorized as a B2C environment, and the relationship between companies and large commercial farms could be categorized as a B2B environment.

2.2. Marketing Applications in B2B and B2C

The literature review of marketing applications in B2B and B2C is divided into three approaches. First, it presents the origins of the business' literature and the origins of the consumer's literature. Second, it presents the marketing application characteristics for the B2B and B2C according to studies from the last ten years. Lastly, it compares both concepts and indicates their similarities and differences, according to recent and relevant authors. This comparison is then summarized in a table.

2.2.1. Business-to-Consumer (B2C)

In B2C marketing, the consumer is considered to be the customer (KUMAR; PANSARI, 2016). The concept of consumer can be found in the seminal work of SMITH (1776) who affirmed that *“consumption is the sole end and purpose of all production; and the interests of the producer ought to be attended to only insofar as it may be necessary for promoting that of the consumer”* (SMITH, 1776, p. 512). This perspective in marketing can first be seen in the marketing concept, popularized by Mckitterick (1957) who defined *“the principal task of the marketing function [...] is not much to be skillful in the making the customer do what suits the interests of the business as to be skillful in conceiving [...] what suits the interests of consumers”* (MCKITTERICK, 1957, p. 79)

At the outset of marketing as an academic discipline, consumers were seen as “rational-analytical” in their decisions to purchase (KENNEDY; LACZNIAK, 2016). Alderson (1957) theorized that rational problem-solving is a crucial aspect of consumer behavior, and BARTELS (1988) suggests consumers as predominantly “economic men.” Thus, the consumer was perceived as an analytical decision-maker, who assess product-price trade-offs in his process of choosing (HARRIS, 2007).

After the “rational-analytical” conceptualization, some authors proposed other concepts perceiving the consumer as being “imperfect” in their decision-making abilities, recurring to irrational motivations (KENNEDY; LACZNIAK, 2016). Katona (1953) questioned the analytical concept by arguing that consumers, in order to be rational decision-makers, should have full information and knowledge to execute decisions entirely. However, consumers use incomplete information, while having limited choices and using previous experience to make decisions (KATONA, 1953). Therefore, this lack of full information, most of the time, does not result in the most efficient purchase. Other authors opined that the marketer could not afford to view consumers as rational, and, with detailed observation of consumption, a pattern of behavior might be identified to predict consumer’s choices (KENNEDY; LACZNIAK, 2016).

A more recent conceptualization of consumers sees them as “persons” (KENNEDY; LACZNIAK, 2016). GARDNER; LEVY (1955) argues that consumers are complex individuals whose decision-making could include likes, dislikes, attitudes, motivations, and one’s life experience. In this concept, the consumers are seen as “human” from the psychological standpoint with their own biases affecting the consumption (KENNEDY; LACZNIAK, 2016).

More recently, studies have considered variations of consumer marketing to a new substantive area. For example, Shankar et al. (2011) have argued that shopper marketing differs from traditional marketing. While traditional markets focus on consumers and their consumption patterns, shopper marketing targets shoppers in shopping mode. Therefore, marketing literature has defined the shopper marketing as the planning and execution of all marketing activities that influence a shopper along, and beyond the entire path-to-purchase, from the point at which the motivation to shop first emerges, through the purchase, consumption, repurchase, and recommendation (SHANKAR et al., 2011)

Despite the body of literature studying the consumer, it is possible to assume another perspective of analyzing the consumers as a type of market. More recent literature has seen the

consumer markets as having unique characteristics. For instance, B2C markets have large customer segments (LILIEN, 2016) that are dispersed geographically (DOTZEL; SHANKAR, 2019), with these segments of customers having relatively smaller-unit transactions (DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016; LILIEN, 2016).

For B2C firms, the focus is on generating volume sales and market share (KUMAR; PANSARI, 2016) through a pool of clients, and considering the distribution channels that are composed by different types and number of agents (DOTZEL; SHANKAR, 2019). The purchase cycle of customers is relatively direct and quick (LILIEN, 2016; LUO; KUMAR, 2013) and the relationship with the suppliers is built on the product or service offered, with some customers becoming emotionally committed to a company, by identifying with the product or brand (KUMAR; PANSARI, 2016). However, consumers can be more easily influenced to change suppliers due to its low switching costs (PICK; EISEND, 2013).

B2C firms focus their communication efforts, such as advertising, sales promotion, and public relations, to reach a large market (KUMAR; PANSARI, 2016). The propositions of these firms tend to be more perceptual than technical, and some authors argue that consumers perceive more value on the brand than in the use (LILIEN, 2016). The B2C firms also offer more standardized services to consumers (DOTZEL; SHANKAR, 2019), as different types of problems and needs can turn the customization more complex for the firms to deal with. Therefore, companies try to categorize customers in segments by some characteristics, in order to deal with them (DOTZEL; SHANKAR, 2019).

2.2.2. Business-to-Business (B2B)

In B2B marketing, previously called industrial marketing (LILIEN, 2016), the organization is considered to be the customer (KUMAR; PANSARI, 2016). The industrial marketing had its first work published in the 1960s, with mostly descriptive research from the USA and UK laying the foundation for automated buying (CHAVAN; CHAUDHURI; JOHNSTON, 2019).

The first descriptive theory of the industrial-buying process was created by Webster (1965). In this period, themes such as “the BUYGRID framework” (ROBINSON; FARRIS; WIND, 1967) and the model of information processing for executive decision-making (CHRISTIAN; LEWIS, 1966) were created. The B2B field was further diversified in the 1960s with topics such as

industrial buying, relationship, innovation and brand (CHAVAN; CHAUDHURI; JOHNSTON, 2019).

In the 1970s, the articles of industrial buying increased significantly (CHAVAN; CHAUDHURI; JOHNSTON, 2019). Models such as the general model of organizational buying behavior and the model of industrial buying behavior were proposed contributing to the diffusion of the field. (CHAVAN; CHAUDHURI; JOHNSTON, 2019).

In the 1980s, Johnston and Bonoma (1981) introduced the concept of buying center to the literature, Moriarty and Bateson (1982) presented the concept for organizational purchase decisions, and Silk and Kalwani (1982) introduced the influence of these units on organizational purchase decisions. Additionally, in this period, other topics emerged, such as market segmentation, purchasing decisions, and buyer-seller relationship (CHAVAN; CHAUDHURI; JOHNSTON, 2019).

In the 1990s, CHAVAN; CHAUDHURI; JOHNSTON (2019) identified that many studies started studying constructs, such as interdepartmental conflicts and disaffection in agency-client relations, to improve the models developed by seminal work. In this period, topics such as market segmentation were also some scholar's research objectives (CHAVAN; CHAUDHURI; JOHNSTON, 2019)

After the 1990s, other constructs emerged, such as customer satisfaction, perceived value and market orientation effect on buyer-seller relationship satisfaction (CHAVAN; CHAUDHURI; JOHNSTON, 2019). CHAVAN; CHAUDHURI; JOHNSTON (2019) also identified that constructs such as relationship marketing and sales force performance were also the focus of studies. More recently, themes such as value-based selling, social media impact in B2B and customer engagement were the focus of many B2B researchers (CHAVAN; CHAUDHURI; JOHNSTON, 2019).

When analyzing B2B marketing, the more recent body of literature presents characteristics that differentiate this concept from other types of relationships. For instance, B2B markets have a low number of available clients (KUMAR; PANSARI, 2016; LILIEN, 2016) who are more concentrated in specific regions (DOTZEL; SHANKAR, 2019).

The value per purchase is more significant for organizations than in B2C, where a single client expends large amounts of money in the purchase of a single product or service (DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016; LILIEN, 2016). In this case, the distribution channels are short and direct (DOTZEL; SHANKAR, 2019), and B2B firms deal directly with their clients through the sales force, where each client has a point person who has in-depth knowledge of the client's needs (KUMAR; PANSARI, 2016).

Additionally, the interaction between customers and employees is the critical factor in influencing the decisions, with employee's attitudes, behavior, and knowledge being critical differentiating factors for the firm (KUMAR; PANSARI, 2016). B2B customers have a web of participants responsible for making the buying decisions and develop a complex buying sequence in the purchase process. (LILIEN, 2016). Due to this, the purchase cycle, on average, takes longer (LUO; KUMAR, 2013) and the relationship between buyer-seller is complex, interpersonal and interdependent (KUMAR; PANSARI, 2016).

Nevertheless, the relationship between businesses tends to be complex, interpersonal, and interdependent (KUMAR; PANSARI, 2016) and the cost of switching suppliers can be significantly higher due to the accumulated knowledge and relationship (PICK; EISEND, 2013).

In the B2B setting, the focus of communication efforts tends to be in building the relationship between the firms (KUMAR; PANSARI, 2016), and the buyers' proposition to the seller is focused on technical aspects. The service offered to clients is tailored to buyers' needs due to less complexity if compared to B2C. However, their problems and needs tend to be similar between companies of the same industry that compete in the same segment.

2.2.3. Main Characteristics

Previously, the literature review presented the characteristics of the B2C and B2B marketing, and it was possible to identify different aspects of each setting that creates a distinction between the two definitions. Comparing studies that confront those two perspectives, it is possible to find some aspects that are analyzed by researchers to identify the differences between B2C and B2B marketing.

Although these concepts are very complex, this research has simplified them in order to create a framework where both the B2C and B2B marketing could be compared. However, this study

is aware of the limitations that some important aspects may be lost in this simplification. For instance, this research discusses that in B2B marketing, the process is rational. However, a recent study has found that organizational buyers may not be so rational as expected (SAAB; BOTELHO, 2019). Nevertheless, this simplification is useful to serve as a framework to distinguish both concepts. Thus, aware of the limitations, the characteristics were organized into topics and summarized in Table 3.

Table 3 – Differences between B2C and B2B (continues)

Characteristics	B2B	B2C	Source
Types of buyers and decision-making units	Customers are organizations that have a web of decisions and influence participants.	Customers are consumers, or an individual person, who decide the purchase.	DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016; LILIEN, 2016
Number of available buyers and purchase value of a single buyer	Low number of available clients in a specific region that yield high value per purchase. A single client expends large amounts of money in the single purchase of products and services.	High number of available clients. Each person can be considered a consumer. A single consumer yields low value per purchase. A pool of clients generates sales volume and market share for the seller.	DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016; LILIEN, 2016
Distribution of buyers in the territory	Clients are geographically concentrated. Similar companies can usually be found in the same area.	Clients are not usually concentrated in a geographical area. Consumers are usually distributed in different regions.	DOTZEL; SHANKAR, 2019
Characteristics of buyers' problems, needs and segmentation	Problems and needs are similar between companies of the same industry and compete in the same segments. Customers are usually segmented by firm size.	Different types of problems and needs among customers. Usually, consumers can be categorized according to behavioral aspects.	DOTZEL; SHANKAR, 2019
Distribution channels in the market	Short or direct distribution channels.	Distribution channels are composed of different types and number of agents.	DOTZEL; SHANKAR, 2019
Purchase cycle	Purchase cycle, on average, takes longer, demanding multiple contacts and involves more people in the decision process.	The purchase cycle, on average, is shorter, demanding few contacts and usually involves a single person.	DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016

Table 3 – Differences between B2C and B2B (concluded)

Characteristics	B2B	B2C	Source
Characteristic of the relationship between buyer and seller	The relationship between businesses is complex, interpersonal, and interdependent.	Customers can be emotionally committed to a supplier and can identify with purchases and firms.	DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016
Drivers of the relationship between buyer and seller	Sales force is the driver of the relationship, and each client has a point person who has in-depth knowledge of the client's needs and challenges.	The product or service offered by the firm is the driver of the relationship with the consumer.	DOTZEL; SHANKAR, 2019; PICK, 2013
Cost of switching a supplier	The cost of switching is higher due to the accumulated knowledge and relationship with a supplier.	Customers are more easily influenced to switch suppliers.	LILIEN, 2016
Characteristics of how the buyer perceives value	Organizations perceive value in use, and it is generally quantifiable.	Consumers perceive value in brand relationship.	KUMAR; PANSARI, 2016
Interaction between buyers and sellers' employees	Interaction between customers and employees is a critical factor in influencing decisions. Employee's attitudes, behavior, and knowledge can be critical differentiating factors for the firm.	The employee is not a critical factor in the customer's decision-making process.	DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016
The focus of communication efforts	The communication effort is on relationship building between buyers and sellers.	The communication effort is on advertising, sales promotion, and public relations to reach a large market.	LILIEN, 2016
Characteristic of the sellers' proposition to clients	Propositions to organizations are technical.	Propositions to consumers are perceptual.	DOTZEL; SHANKAR, 2019; LILIEN, 2016
Services offered by sellers to buyers	Services are tailored to buyer needs.	Services are generally standardized.	DOTZEL; SHANKAR, 2019

Source: Elaborated by the author

3. METHODOLOGY

This section describes the scientific method to meet this study's proposed objective. First, it presents the types of methodological approaches. Second, it presents the procedures that were used in order to develop this research. Some studies with similar methodology will also be cited in order to offer support for the proposed approach.

3.1. Types of Methodological Approach

Saunders, Lewis, and Thornill (2009, p. 256) divide the types of data in two categories: 1) secondary data; 2) primary data. At the former, are the data that already have been collected for some other purpose. Such data are known as secondary data. At latter, are the data that have been collected by the researcher for a specific purpose. Such data are known as primary data.

Secondary data include both raw data and published summaries by some organizations, such as companies, newspaper, government departments, consumer research organizations and trade organization (SAUNDERS; LEWIS; THORNHILL, 2009, p. 256). Secondary data can be split into three categories: 1) documentary, 2) survey and 3) multiple sources. The documentary data includes written and non-written materials. Some examples of written materials are correspondence, minutes of meetings, reports to shareholders, diaries, books, journals, magazine articles and newspapers. For non-written materials, some examples are voice and video recordings, pictures, drawings and films. The survey data refers to data collected using a survey strategy usually by questionnaires (SAUNDERS; LEWIS; THORNHILL, 2009, p. 250). In this category, censuses data, continuous/regular surveys or ad hoc surveys can be found. At the multiple source data, different data sets have been combined (i.e., documentary and survey) to form another data (SAUNDERS; LEWIS; THORNHILL, 2009, p. 262). The new form of data is usually found as an area-based analysis or in a time-series based analysis. Some examples of area-based analysis are country reports, government publications and books. For time-series based analysis, some examples are industry statistics and reports, government publications and union reports.

On the other hand, as stated before, primary data are collected by the researcher for a specific purpose. Some authors divide the methodological approach in two categories: qualitative and quantitative research and draw a distinction between both approaches (e.g., EASTERBY-SMITH et al., 2008). Saunders, Lewis, and Thornill (2009, p. 482) inform three differences

between quantitative and qualitative data. The first one is that qualitative data is based on meanings expressed through words, rather than derived from numbers. The second is that the collection results are in non-standardized data, requiring classification into categories. And the third is that the analysis is conducted using conceptualization rather than the use of diagrams and statistics.

Creswell (2014, p.4) defines qualitative research as an approach for exploring and understanding the meaning individuals or groups ascribe to a social or human problem. This method involves emerging questions, where the data are typically collected in the participant's setting, and data analysis is inductively made from specific to general themes, with the researcher making interpretations of the meaning of the data (CRESWELL, 2014).

Creswell (2014, p.13) describes five types of strategies for qualitative research. The first one is the narrative research, where the researcher studies the lives of individuals and asks one or more individuals to provide stories about their lives. The second one is the phenomenological research, where the researcher describes the lived experiences of individuals about a phenomenon as it was described by participants. The third one is the grounded theory, where the researcher derives an abstract theory of an interaction grounded in the views of the participants. The fourth one is the ethnography, where the researcher studies the shared patterns of behaviors, languages, and actions of a group. And the fifth and last is the case studies, where the researcher develops an in-depth analysis of a case of one or more individuals.

One of the types of data described by Flick (2007, p. 77), in the qualitative design, is verbal. In this type, three collection strategies can be understood: interviews, narratives, and focus groups. Interviews are one of the dominant methods in qualitative research, and, in most cases, single interviews are done through the use of an interview guide (FLICK, 2007). Flick (2007, p. 78) describes that interviews can usually be done individually or with a group, which is different from the focus group. The sampling in the interview method is focused on finding people with relevant experience for the study and finding a variety of cases and experiences and, sometimes, about finding similar cases to comparison (FLICK, 2007).

Saunders, Lewis, and Thornhill (2009, p. 320) categorize interviews in three types: structured interviews, semi-structured interviews, and in-depth interviews. In the structured interviews, the researcher uses questionnaires based on predetermined questions. In this case, this category of the interview is typically used to collect quantifiable data (SAUNDERS; LEWIS;

THORNHILL, 2009). In the semi-structured interviews, the researcher will have a list of themes and questions to be covered, and these may vary from interview to interview. The order of questions in this category may vary according to the flow of the interview (SAUNDERS; LEWIS; THORNHILL, 2009). Lastly, in the in-depth interviews, the researcher would explore in-depth general areas without the support of a predetermined list of questions. In this category, the interviewee can talk freely about events, behaviors, and beliefs regarding a specific topic (SAUNDERS; LEWIS; THORNHILL, 2009).

Saunders, Lewis, and Thornhill (2009, p. 322) affirm that semi-structured interviews are more appropriate when the researcher's goal is to explore a specific topic and to seek new insights. Furthermore, the semi-structure research can also be useful to explain some relationship between variables that were previously identified by the researcher (SAUNDERS; LEWIS; THORNHILL, 2009).

3.2. Methodological Procedures for this Research

In order to understand the marketing practices of an input company with farmers, a qualitative method approach was chosen in order to scrutinize and answer the research question. This approach is best suited for cases where scholarly insights are scarce, and when it is necessary to explore a problem in order to understand it (CRESWELL; CLARK, 2010). Recent research published in the Journal of Marketing used the same approach in order to explore the business-to-government (B2G) subject, where literature regarding this topic was not found (JOSEPHSON et al., 2019).

In order to achieve the objectives of this study, five semi-structured interviews were organized with input suppliers and industry experts. For the input suppliers, the objective was to identify the firm perspective regarding marketing practices with farmers. To achieve it, four current or past marketing managers or marketing directors from different companies were selected. The companies were selected according to their market positioning and market share in the inputs market. For the industry experts, the objective was to capture the outside perspective of an executive who worked with the four companies that were studied and has years of experience in marketing practices of input suppliers with farmers. Since the main objectives of this study is to explore the B2F marketing and how it has been used by agribusiness managers, this research has chosen not to interview farmers. However, it recognizes the study of the farmer as an relevant opportunity for future studies.

All interviewees were also selected based on their experience in the agribusiness market, having at least fifteen years of work in the sector. The interviewees were contacted by phone or e-mail and received an invitation letter to participate in the study, which can be found in Appendix A.

Traditionally, crop protection companies are divided into three categories: patent products companies, proprietary off-patent products companies, and generic products companies (AGRIBUSINESS GLOBAL, 2009; PORTAL AGRONEGÓCIOS, 2019; UPL, 2016). The patent products companies are the companies that have significant investments in research and development of new active ingredients of products, which are patented after development. These patents, ensure the exclusive right, during a specified period for the invention, which offers a new technical solution to a problem (WIPO, 2019). The proprietary off-patent products companies are companies that have products with no patent protection, but also have no generic competition. This is achieved by improving the product's formulation and characteristics in order to protect the intellectual propriety (AGRIBUSINESS GLOBAL, 2009). Finally, the generic products companies are companies that have no differentiation products and usually have the same product as their peers (AGRIBUSINESS GLOBAL, 2009).

To ensure less biased findings, the executives were selected based on the types of companies they work for. Before selecting the interviewees, an industry expert was consulted and indicated the four executives to be interviewed, being two from patent product companies, one from proprietary off-patent products company, and one from generic products company.

The five interviews occurred in public places, such as coffee shops, or in the companies' offices. Each interview lasted, on average, 1 hour and 28 minutes, totaling 07 hours and 22 minutes. Except for one interviewee, all interviews were recorded with the permission of the interviewee and transcribed. The transcriptions were not included in the appendix of this work since some sensitive information was disclosed during the interviews. With this information, it would be possible for one to identify the name of the interviewees or the companies they work.

Table 4 resumes the information of the interviews.

Table 4 – Information of the Interviews

Interviewee	Company Type	Job Position	Years of Experience	Permission to Record	Duration of the Interview
Interviewee 1	Proprietary Off-Patent	Global Head Marketing and Business Development	23 years	Yes	01h36m
Interviewee 2	Generic	Marketing and Go-to-Market Manager	16 years	Yes	01h57m
Interviewee 3	Patent	Former-Marketing Head Brazil and Current Managing Partner of a Research Company in Agribusiness	20 years	Yes	00h49m
Interviewee 4	Patent	Go-to-Market Manager	16 years	No	01h28m
Interviewee 5	Industry Expert	Managing Partner of a Management Consulting Firm Specialized in Agribusinesses	16 years	Yes	01h32m
					Total: 07h22m

Source: Elaborated by the author

The following subsections describe the role of the interviewees and companies. The name of the companies will not be informed in this work to guarantee the security of the interviewees information since some interviewees disclosed data regarding the company business, practices, and strategy.

3.2.1. Interviewee 1

The Interviewee 1 is the Global Head of Marketing and Business Development of one of the top five players in crop protection in Brazil (AGROPAGES, 2019). He has worked for patent and proprietary off-patent companies in his twenty-three years of experience. Interviewee 1 has developed his career in marketing and go-to-market practices. Currently, he is based in the USA but has worked in the Brazilian market for twenty-two years. Interviewee 1 gave permission to record the interview, which lasted one hour and thirty-six minutes.

3.2.2. Interviewee 2

Interviewee 2 is the Marketing & Go-to-Market Manager of one of the top twenty players in crop protection in Brazil (AGROPAGES, 2019). He started working with the agribusiness industry since the beginning of his sixteen years' career. Interviewee 2 started his career in

management consulting in Brazil, specialized in the Agribusiness industry, and has worked for a generic crop protection product company for the last six years. He developed his career in the marketing field. Currently, he is based in the State of São Paulo in Brazil. Interviewee 2 gave permission to record the interview, which lasted one hour and fifty-seven minutes.

3.2.3. Interviewee 3

Interviewee 3 is the former Marketing Head Brazil of one of the top five players in crop protection in Brazil (AGROPAGES, 2019). He has worked for patent companies in twelve of his twenty years of experience. Currently, he is the senior partner of one of the biggest market research companies in Brazil, specialized in the agribusiness industry. Interviewee 3 has developed his career in marketing field. Currently, he is based in the State of São Paulo in Brazil. Interviewee 3 gave permission to record the interview, which lasted forty-nine minutes.

3.2.4. Interviewee 4

Interviewee 4 is the Go-to-Market Manager of one of the top five players in crop protection in Brazil (AGROPAGES, 2019). He has worked for patent companies during his sixteen years of experience. Interviewee 4 started his career in sales and now works in the marketing practice of the company. Currently, he is based in the State of São Paulo in Brazil. Interviewee 4 did not give permission to record the interview, which lasted one hour and twenty-eight minutes.

3.2.5. Interviewee 5

Interviewee 5 is an industry expert in the agribusiness industry. He is a senior partner in a management consulting firm, specialized in the agribusiness industry, and has worked with consulting projects, lectures and training with almost all the top twenty crop protection firms in Brazil (AGROPAGES, 2019), during his sixteen years of experience. Additionally, Interviewee 5 has worked with distribution channels (e.g., cooperatives and dealers) and has studied the characteristics of the agribusiness industry in Brazil, Latin America, and the United States. Interviewee 5 gave permission to record the interview, which lasted one hour and thirty-two minutes.

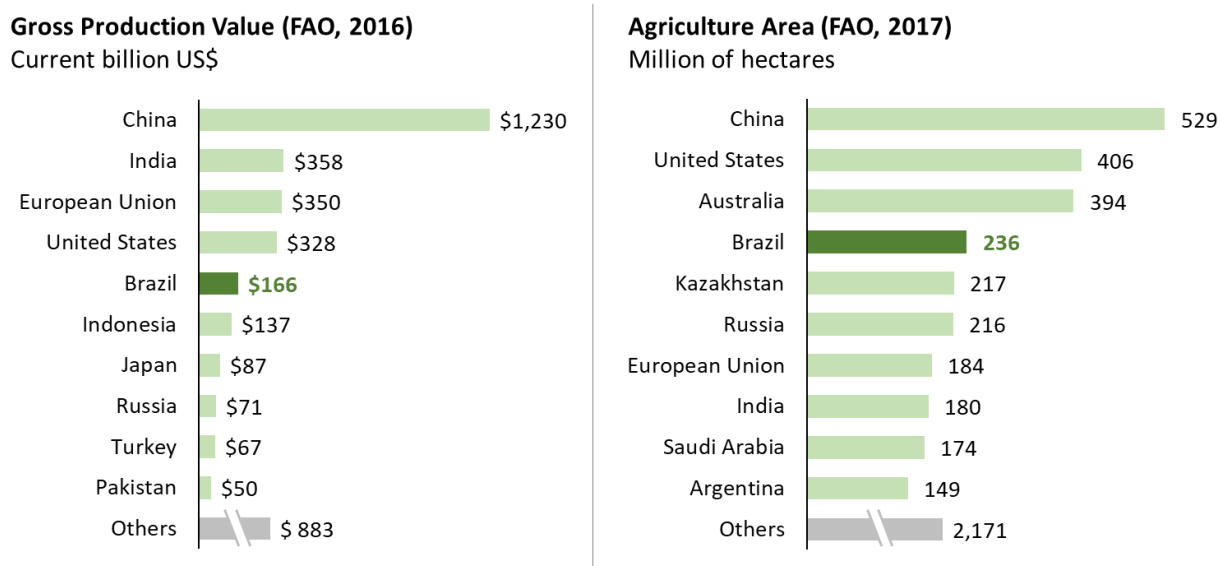
4. RESULTS

4.1. Industry Data Analysis

According to the Food and Agriculture Organization of the United Nations (FAO, 2017), two measures can be analyzed to identify the importance of agriculture for an economy: Gross Production Value (GPV) and agriculture area. The GPV measures the production of the crops in monetary terms at the farm gate level. The agriculture area is accounted for the country's cropland and land under permanent meadows and pasture, which is the land available for the production of farm products.

In terms of GPV, six economies account for more than half of the world's food production: China, India, European Union, USA, Indonesia and Brazil (THE WORLD BANK, 2019). Furthermore, in terms of agriculture area, Brazil has the fourth-largest area globally (FAO, 2016, 2017). Chart 1 presents Brazil's position in GPV and Area.

Chart 1 – Countries Agriculture GPV and Agriculture Area

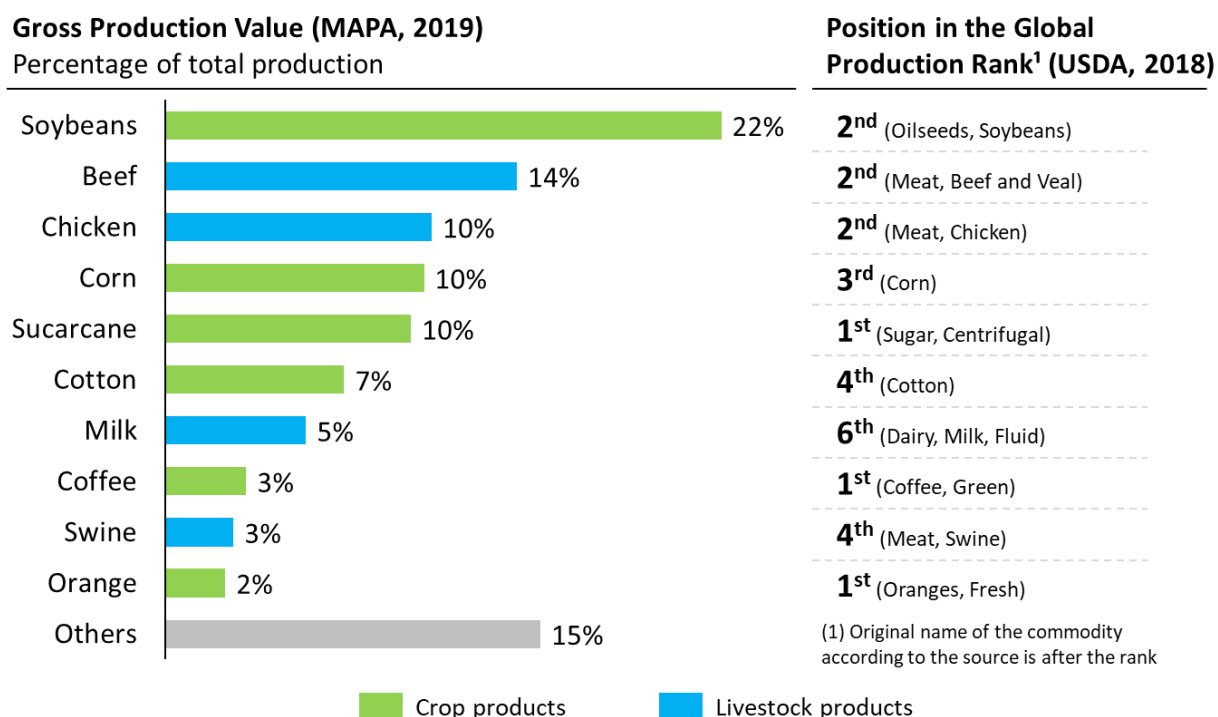


Source: Elaborated by the author, based on FAO (2016, 2017)

Brazil is ranked as one of the largest producers of the agricultural goods it produces. Considering the GPV, ten crops accounted for eighty-five percent of all production in 2019 (MAPA, 2019): Soybeans (22%), Beef (14%), Chicken (10%), Corn (10%), Sugarcane (10%), Cotton (7%), Milk (5%), Coffee (3%), Swine (3%) and Orange (2%). For these products, Brazil ranks among the top producers: Soybeans (2nd position), Beef (2nd position), Chicken (2nd

position), Corn (3rd position), Sugarcane (1st position), Cotton (4th position), Milk (6th position), Coffee (1st position), Swine (4th position) and Orange (1st position). Chart 2 presents the GPV of crops produced in Brazil and their rank globally.

Chart 2 – GPV of Crop Products in Brazil and their Position in the Global Production Rank



Source: Elaborated by the author, based on MAPA (2019) and USDA (2019).

In order to produce these goods, Brazil has a significant amount of people working on farms, however, it is possible to find some particularities regarding the farm structure in Brazil. The country has 15 million people working in 5 million farms (IBGE, 2017). Observing some crops, it is noticeable that most farms have sizes inferior to 50 ha: Soybeans (72.64%), Corn (97.99%), Sugarcane (95.00%), Cotton (86.88%), Coffee (88.37%), Orange (86.67%).

Table 5 – Farm Sizes Segments and Number of Farms in Brazil in 2017

Farm Size Segment	Soybeans	Corn	Sugarcane	Cotton	Coffee	Orange
Number of Farms	236,245	1,655,450	171,348	3,224	264,334	55,912
Less than 1 ha	0.62%	54.75%	64.31%	43.55%	2.74%	8.95%
From 1 to 2 ha	2.02%	20.93%	12.99%	27.14%	6.48%	9.83%
From 2 to 5 ha	13.46%	14.79%	10.41%	13.52%	24.25%	19.37%
From 5 to 10 ha	18.16%	3.85%	2.99%	1.52%	20.66%	17.77%
From 10 to 20 ha	19.63%	2.14%	2.03%	0.62%	18.09%	15.84%
From 20 to 50 ha	18.75%	1.54%	2.27%	0.53%	16.16%	14.90%
From 50 to 100 ha	9.47%	0.70%	1.43%	0.53%	6.60%	6.50%
From 100 to 200 ha	6.45%	0.49%	1.16%	0.90%	2.97%	3.37%
From 200 to 500 ha	6.12%	0.44%	1.05%	1.89%	1.51%	2.22%
More than 500 ha	5.32%	0.37%	1.35%	9.80%	0.55%	1.24%

Source: (IBGE, 2017)

However, when examining the GPV of these farms, a new landscape can be identified. In the Soybeans crop, 91.9% of all the GPV is produced by only 27.4% of the farms (farms with more than 50 hectares). For Corn, 79.5% of all the GPV is produced by only 2.0% of the farms (farms with more than 50 hectares). For Sugarcane, 95.7% of all the GPV is produced by only 5.0% of the farms (farms with more than 50 hectares). For Cotton, 99.9% of all the GPV is produced by only 13.1% of the farms (farms with more than 50 hectares). For Coffee, 58.9% of all the GPV is produced by only 11.6% of the farms (farms with more than 50 hectares). And, for Orange, 93.0% of all the GPV is produced by only 13.3% of the farms (farms with more than 50 hectares).

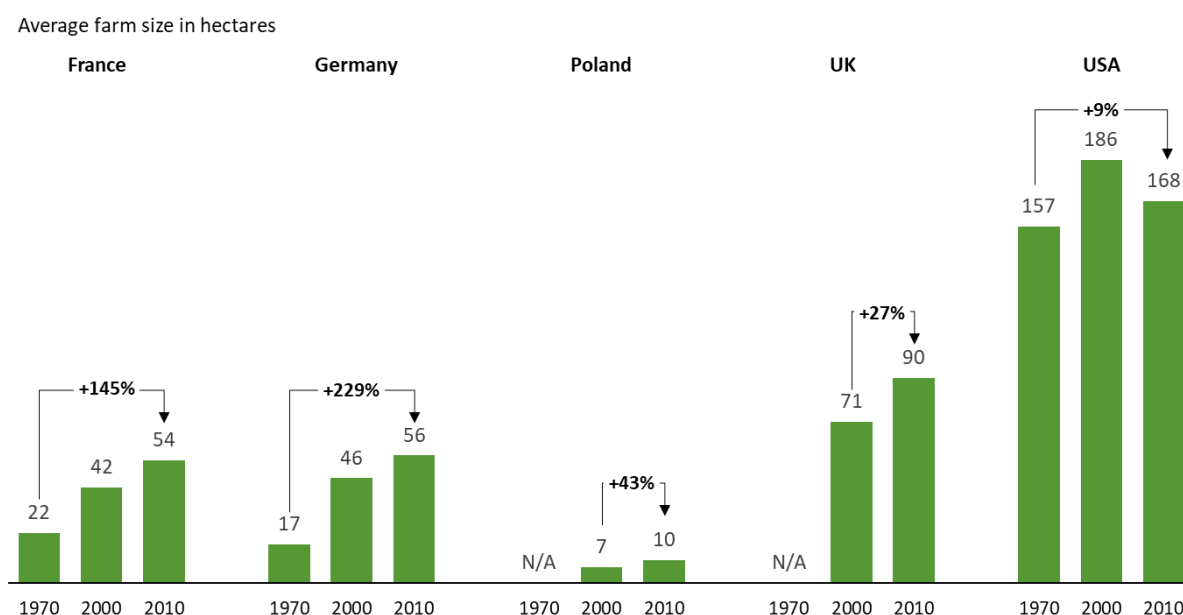
Table 6 – Percentage of Gross Production Value Generated by each Farm Size Segment in Brazil in 2017

Farm Size Segment	Soybeans	Corn	Sugarcane	Cotton	Coffee	Orange
Less than 1 ha	0.0%	1.5%	0.7%	0.0%	0.1%	0.1%
From 1 to 2 ha	0.0%	2.0%	0.5%	0.0%	0.7%	0.1%
From 2 to 5 ha	0.4%	4.1%	0.8%	0.0%	5.6%	0.5%
From 5 to 10 ha	1.0%	3.1%	0.4%	0.0%	7.9%	0.9%
From 10 to 20 ha	2.1%	3.8%	0.5%	0.0%	10.6%	1.6%
From 20 to 50 ha	4.6%	6.1%	1.3%	0.0%	16.3%	3.9%
From 50 to 100 ha	5.2%	6.0%	2.1%	0.1%	12.8%	4.5%
From 100 to 200 ha	7.1%	8.1%	3.3%	0.6%	12.9%	8.3%
From 200 to 500 ha	14.8%	15.5%	6.3%	3.5%	15.5%	14.9%
More than 500 ha	64.7%	50.0%	84.1%	95.7%	17.7%	65.3%

Source: (IBGE, 2017)

Another factor contributing to most of the production coming from a few farms is that their number has been decreasing while their average size has been increasing (AGWEB, 2018). Academics, government organizations, and companies from different countries have been studying this increasing trend of farm consolidation and its economic impacts (JI et al., 2016; MACDONALD; HOPPE; NEWTON, 2018; MEDINA et al., 2015). Although no official data from Brazil is known, this trend can be seen around the globe. A study organized by the Boston Consulting Group (BCG, 2015) showed that from 1970 to 2010, the average farm size has increased consistently in different countries, such as Germany (+229%), France (+145%), Poland (+43%) UK (+27%) and the USA (+9%). Some studies argue that farmland consolidation creates larger and better-managed farms, which are more productive and efficient (BCG, 2015; SUMNER, 2014). Moreover, BCG (2015) showed that these larger farms have different priorities and needs, creating demand for new technologies and usage of different products and services, impacting the market dynamics in the agribusiness industry.

Chart 3 – Increase on the average farm size from 1970 to 2010



Source: Elaborated by the author, based on BCG (2015)

Nevertheless, this consolidation movement can also be seen in other stages of the agribusiness industry chain. In the last few years, the FICs have been combining forces in order to build scale, gain competitiveness and meet the increasing demand for food (AGWEB, 2018). Dow acquired DuPont in 2015 (Fortune, 2017), ChemChina acquired Syngenta in 2016 (Fortune, 2017), Bayer acquired Monsanto in 2016 (Bloomberg, 2018), and UPL acquired Arysta in 2018 (Economic Times, 2018). In countries such as Brazil, it is possible to see a similar trend. Agricultural dealers have been noticed by a series of private equity firms and Chinese groups. Two of the most important dealers in the state of Parana have gone through deals. Belagrícola was acquired by Shanghai Pengxin by almost US\$ 250 million (EXAME, 2018) and Agro100 was acquired by Acqua Capital in 2017 (BVMI, 2017). This consolidation and other market trends of the industry have been analyzed by Nishimoto (2019) and published in the Journal of Pesticides Science.

These trends are relevant to farmers since they impact the farm operation costs. On the farm, the growers have a series of activities to produce the crops that represent high costs of production. Generally, the costs to execute such activities can be divided into four categories: (1) Operations, (2) Inputs, (3) Post-Harvest, and (4) Management (IEG FNP AGRIBUSINESS, 2018). First, the operations category relates the costs to all activities in the farm related to the

crop's production (e.g., maintaining the soil, preparing the land for planting, planting the seeds, application of inputs products, and harvesting). Second, the input category summarizes the costs related to the purchase of products that offer better conditions for the crop to establish, grow, and yield more per area (e.g., fertilizers, seeds, crop protection, and other inputs). Third, post-harvest summarizes the costs related to dealing and transporting production. Fourth, the management category summarizes the costs regarding the administrative activities to run the farm (e.g., labor, technical assistance, accounting, energy and others).

Table 7 – Share of Overall Operation Costs in Farms in 2018

	Soybeans	Corn	Sugarcane	Cotton	Coffee	Orange
Operations (e.g. planting, application of inputs and harvest)	17%	13%	26%	19%	55%	66%
Inputs (e.g. fertilizers, seeds, crop protection)	66%	57%	23%	64%	31%	26%
Management (e.g. labor, technical assistance, accounting, energy, travels)	10%	7%	5%	3%	14%	8%
Post-Harvest (e.g. transport)	7%	23%	47%	14%	0%	0%

Source: Elaborated by the author, based on IEG FNP AGRIBUSINESS (2018)

Table 7 shows that costs included in the input category have a high impact when analyzing the main crops: soybeans (66%), corn (57%), sugarcane (23%), cotton (64%), coffee (31%) and orange (26%) (IEG FNP AGRIBUSINESS, 2018). These products are considered expendable products used by the farmer during the production of crops that are bought every crop year (BORCHERS et al., 2012).

The five most prominent FICs globally in 2019 were Syngenta, Bayer, BASF, Corteva, and FMC (MARKET RESEARCH REPORTS, 2019). In Brazil, the same players lead among the input companies in the marketplace (AGROPAGES, 2019). Considering only the crop protection business, a type of input product used by the farmer, the global market accounted for US\$ 56.5 billion (INFORMA, 2018) and Brazil represents almost 20% of it (FAPESP, 2019).

Considering the importance of input products to the growers and the key players in this market, the context of this study will bring the perspective of these input suppliers in Brazil.

Table 8 – Gross Sales of Crop Protection Companies in Brazil

Ranking (By 2018 sales)	Company	2018 (US\$ million)	2017 (US\$ million)	Change %
1	Syngenta	\$ 2,000	\$ 1,587	15.87%
2	Bayer	\$ 1,685	\$ 1,036	10.36%
3	Corteva	\$ 1,180	-	-
4	BASF	\$ 990	\$ 890	8.90%
5	UPL	\$ 961	\$ 500	5.00%
6	FMC	\$ 910	\$ 642	6.42%
7	Nufarm	\$ 594	\$ 504	5.04%
8	Adama	\$ 581	\$ 448	4.48%
9	Iharabrás	\$ 406	\$ 351	3.51%
10	Nortox	\$ 290	\$ 280	2.80%
11	CCAB**	\$ 260	\$ 173	1.73%
12	Ouro Fino	\$ 223	\$ 195	1.95%
13	Atanor/Albaugh	\$ 219	\$ 200	2.00%
14	HELM	\$ 135	\$ 115	1.15%
15	Sipcam Nichino	\$ 90	\$ 76	0.76%
16	Alta	\$ 68	-	-
17	Sinon	\$ 42	-	-
18	Stockton	\$ 40	-	-
19	Rotam	\$ 39	\$ 54	0.54%
20	CropChem	\$ 30	-	-

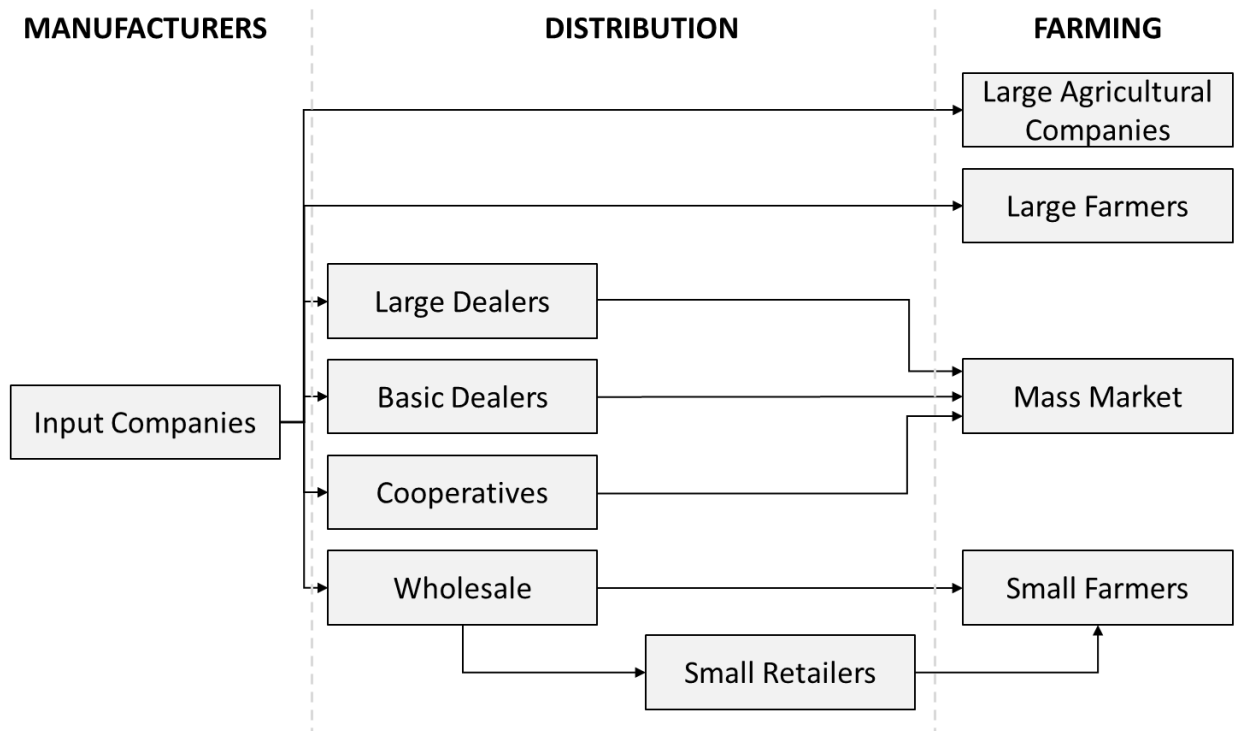
Source: AgroPages (2019)

FICs have three alternatives to sell their products in Brazil: (1) sell directly; (2) cooperatives; and (3) dealers (CÔNSOLI; DO PRADO; MARINO, 2011; NEVES, 2017; NEVES; THOMÉ; BOMBIG, 2001). The direct selling occurs when the industry approach large farmers or purchase pools (a group of farmers buying together) directly (CÔNSOLI; DO PRADO; MARINO, 2011).

The dealers are companies that usually offer a number of products (e.g., equipment, crop protection, seeds, fertilizers) and can operate as a wholesaler, selling products to small dealers, which usually target small farmers, or dealers that sell products directly to farmers (CÔNSOLI; DO PRADO; MARINO, 2011). The cooperatives, on the other hand, are institutionalized groups of farmers that operate through the principles of cooperation (CÔNSOLI; DO PRADO;

MARINO, 2011). Considering the channel structure in Brazil, the context of this study explores the different perspectives among the different types of farmers, which are served by different channel agents.

Figure 1 - Distribution Channel Structure in Brazil



Source: Elaborated by the author, based on C nsoli, Do Prado, and Marino (2011), Neves (2017) and Neves, Thom , and Bombig (2001).

4.2. Interviews Results

This section presents the results of the interviews with the five Brazilian executives. The interviews were based on a semi-structured questionnaire that was developed based on twelve aspects found in the literature that characterizes B2B and B2C marketing. The questionnaire can be found in appendices B, and C. After the presentation of the results, a table that summarizes and compares the findings with the B2B and B2C characteristics is presented.

For the sections below, the interviewees will be presented in an abbreviated form: Interviewee 1 = I1, Interviewee 2 = I2, Interviewee 3 = I3, Interviewee 4 = I4 and Interviewee 5 = I5.

4.2.1. Distribution Channels in Agribusiness

In the distribution channel aspects of agribusiness, the five interviewees were asked about the general marketing channels in Brazil. All interviewees presented the same types of channel structure as found in the Brazilian literature (CÔNSOLI; DO PRADO; MARINO, 2011; NEVES, 2017; NEVES; THOMÉ; BOMBIG, 2001). I1 divides the Brazilian farmers into three categories, small (less than 5 ha / farm), medium (26 ha / farm), and mega or large farms (700 ha / farm). The concept of these three types of farmers (small, medium, and large) was referred by the interviewees multiple times, which can indicate a general industry classification. These farmers can buy products from three sources, dealers, cooperatives and directly from the FICs.

In the dealers category, all interviewees divided this seller into the same three groups: (1) regional dealers, (2) wholesales, and (3) small retailers. The regional dealers are companies that buy directly from the industry and usually supply the medium farmers with products and services. These dealers have their own sales force to visit and assist the farmer. I5 informed that the dealer's sales force is usually composed by people who know the farmers' problems and needs: *"the dealer's sales force is usually composed by people who have been around for more than 10 years, who know all the farmers and the regions' characteristics"* (I5) personally.

The wholesale is also a type of dealer that only sells products to small retailers. According to I4 and I5, these dealers buy products directly from the FICs and are only allowed to sell to small retailers. I5 informed that this model was created to allow the manufactures to supply a fragmented market that otherwise would be difficult to supply.

The small retailers are dealers that buy products and services from the wholesales and supply the small farmers with products and services. According to I4, this channel structure is typical on crops such as fruits and vegetables, where the farm unit is usually smaller (less than 5 ha), and the market fragmented.

The cooperatives are also a type of channel that offers products and services to the farmer. I3 and I5 informed that the cooperatives are usually managed by farmers, and their main objective is to bring products and services to farmers. I2, I3 and I4 mentioned that the cooperatives movement could usually be found in the south region of Brazil.

Direct sale is a type of distribution model in which the FICs access the farmers directly. All interviewees informed that the main reason for direct sales is the market potential of the farms. I3 and I4 informed that the average area of a targeted farm for direct sales is around 20 thousand hectares. I4 estimated that there are 1,000 farms worth selling directly in Brazil in 2019 and that 90% of them are in the states of Goiás, Bahia and Mato Grosso. I2, I3, I4 and I5 informed that the direct sales are very different from the indirect sales (through dealers and cooperatives) and demand high investments in relationship-building, technical support and services. According to I5, “*direct sales are very costly for the manufacturers.*”

I4 and I5 informed that to serve farmers directly, the FICs have a dedicated sales force. I4 informed that these salespeople are usually the best in the company and have strong relationship-building skills to deal with the farmers. I3, I4, and I5 informed that the FICs employ several relationship programs and services to create a strong bond with these farmers. This topic will be explored in the following sections.

According to I4, the differences between accessing the farmer directly and accessing him indirectly are based on the sales force objectives. In direct sales, the sales force has relationship goals alongside the sales goals. However, in indirect sales, the sales force has not only its sales goals but the goals to manage the companies’ market access. In this setting, I5 informed that the sales force needs to better understand the distributor’s business and I4 presented that salespeople will create a relationship only with the substantial farmers (those who are larger in area or region influencers) in the distributor’s region. However, this relationship-building practice is not their primary goal.

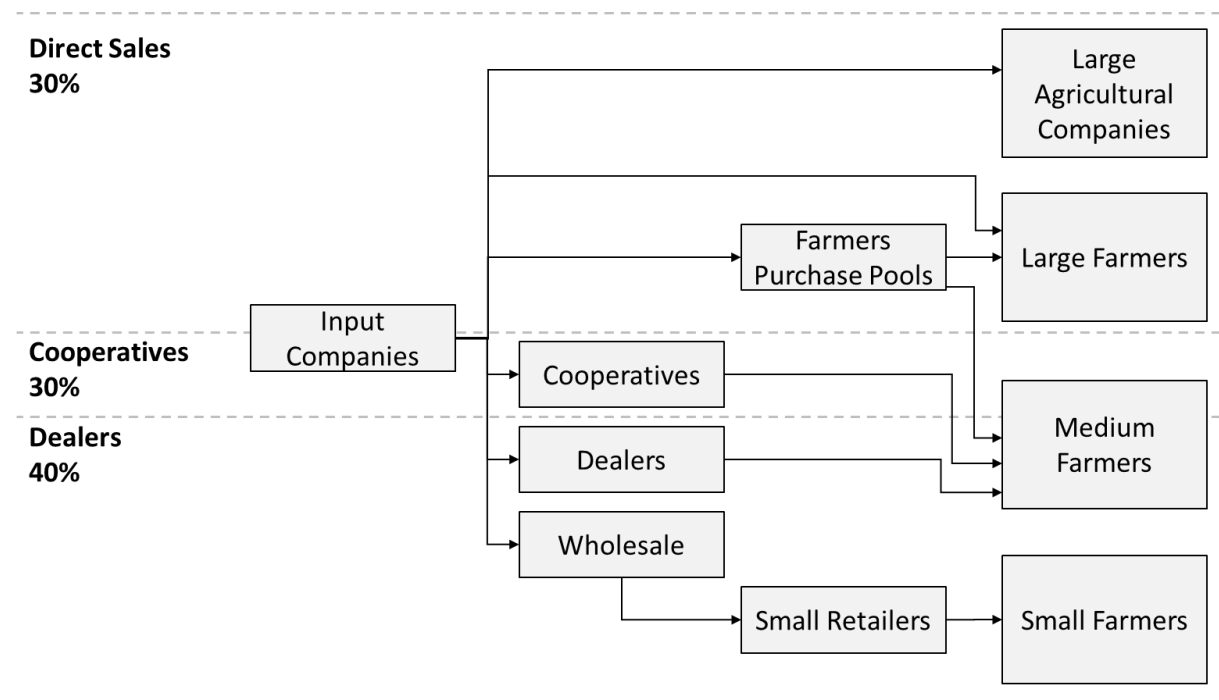
All interviewees presented an alternative distribution model that is called purchase pools. These pools are usually composed of large and medium farmers that arrange themselves in order to increase their market power and obtain better deals from the FICs. In this setting, the pool buys the products as a group, and the FICs deliver directly to each farmer. According to I5, these groups are different from the cooperatives in the sense that cooperatives usually have a formalized and hierarchical structure and have different goals other than buying products at a lower price.

Another type of farmer presented by I2, I3, I4, and I5 is the large agricultural companies. These types of farmers were also found in Brazilian literature. (NEVES, 2017; NEVES; THOMÉ; BOMBIG, 2001). According to all four interviewees who cited this model, these types of

“farmers” have all the formalized structures and procedures of a traditional company and are usually managed by hired executives. These companies usually have large areas, more than 200 thousand hectares, and the interviewees classified their purchase behavior strictly as “transactional,” in which all the related investments and services usually offered by the FICs to large farmers are not applicable. Some examples cited by the interviews were the Amaggi Group and SLC Agrícola.

I1 estimated the percentage of FICs’ sales that go through each channel. The direct sales correspond to 30% of all sales, the regional dealers correspond to 40% of all sales, and the cooperatives correspond to 30% of all sales. Figure 3 summarizes the channel structure in Brazil, according to the five interviews.

Figure 2 – Distribution Channel Structure in Brazil



Source: Elaborated by the author based on the interviews

One aspect that was presented by all five interviewees is that these marketing channels can change according to each crop and region of the country. I1, I2, I3, and I4 informed that in the south, the cooperative's importance is more relevant than in the midwest. The I5 informed that in the sugarcane crop, the sugar mills, companies that process the production of sugarcane farms,

can act as a distribution channel to the farmers. They buy input products for them, apply the products, and discount the investment in the payment for the sugarcane production.

Additionally, I1 informed that in his experience, the marketing channels could change significantly in countries outside Brazil. The interviewee argues that the marketing channel structure is different according to the number of farms and average farm size in the country. For instance, I1 informed that in the USA, the direct selling channel is minimal because farmers are more fragmented than Brazil and channels yield a strong market power.

4.2.2. Purchase Cycle of a Farmer

The interviewees informed that usually the farmers buy products one time per crop year. Interviewee 3 informed that the selling process precedes the farmer's necessity of buying more products, and that, afterwards, the farmer can buy additional products during the spraying season. However, these quantities are minimal if compared to the total volume bought in a crop season. Interviewee 2 said, *"when a crop season ends, we usually start the efforts to sell the products for the next crop season."*

For larger farmers, who buy directly from FICs, the process is similar to the small and medium farmers. However, these farmers receive the salespeople from each company in order to buy the input products. I5 estimates that the medium farmer buys all products for the season during 4 or 5 contacts with multiple vendors (dealers and cooperatives). I1 argues that the number of suppliers is related to the farm's professionalization. *"More organized farmers divide their purchase in up to 3 suppliers. Less organized farmers go to the same distributor, and they believe that this distributor will offer all they need."*

On the other hand, the large farmers need to deal with more than 10 contacts, since they receive each salesperson from each FIC in order to buy every products they need. Although the large farmers follow the same timeline as the small and medium farmers, their decision process can be more difficult as they need to manage and evaluate different suppliers.

4.2.3. Farmer's Decision-Making

The interviewees informed a similar farmer decision-making process, to the one found in the work of Kool (1994). I5 informed that a farmer is an individual person who is usually tied to the land by family heritage or has bought the land for commercial usage. According to I2 and

I4, the farmer is considered the person who owns or has a share of the farm capital and manages some strategic decisions, such as the purchase of crop protection products, which accounts for a significant percentage of the production costs.

I1 argued that the decision-making process changes according to the farm size. Smaller farms depend more on the farmer's family, and, in contrast, bigger farms have dedicated employees for some roles, such as accounting and technical assistance. I1 said, *"... the smaller the farm, the more like a family business it will be. When I say family businesses, I mean those farms with less than 500 hectares. These are the majority of the farms. In these farms, the father (owner) or the oldest son is the person who takes care of everything; he decides everything. In the US, for instance, the mother does the accounting, the oldest son does something and the father does another thing, although the roles are divided into three, four people, it (the farm) is a single organism (...) When you go to larger units, those farms have the status to have a better structure, to have a hired accountant, to have a hired technical agronomist. And you have the owner."*

According to I1, I2 informed that depending on the size of the farm, it is possible to find a manager who deals with day-to-day decisions. However, I4 and I5 presented that even in large farms, the purchase role is usually filled by the farm's owner. I5 added that managers act more like an influencer in the purchase decision than a strict decision-maker. I3 said: *"Today you have a segment that is more automated, a more professional segment. However, even for that farmer, you need to be close to the land, you need to be close to the farm. You can't make an app and just stay in the app. The apps are a complement (for the farm decision-making), isn't it? The app is an extra, not a replacement (...)"*

Additionally, I3 divided the farming decision-making unit into two categories: simple decision-making unit and sophisticated decision-making unit. I3 defined the simple decision-making unit as a small group of people who usually makes farm decisions, such as the farmer, family, and employees. The sophisticated decision-making unit is defined by I3 as a similar structure as it can be found in traditional businesses. In this case, there are well-defined roles and processes to make decisions. However, the interviewee informed that these models could usually be found in large agriculture companies: *"The complex decision-making unit, usually SLC or Amaggi, (...) has a financial board, with whom the decision is shared. They have a well-structured purchase department. They have the financial department, the agriculture manager, etc. (...) And you have (...) those clients (...) that are still (...) a farm, with a simple decision-*

making unit between the partners or one or more partners, and the agriculture manager, etc. (...) They are still big farms, however, with a simple decision-making.” (I3).

Considering the influence aspect of decision-making, according to I5, it can be divided into 2 categories: external or internal. The external influence zone, similarly described by Kool (1994), has three types of influencers: (1) researchers; (2) technical consultants; (3) distributors; and (4) other farmers. First, I5 defined researchers as professionals who are affiliated to either a research institution (e.g., EMBRAPA) or an agricultural university (e.g., ESALQ, Universidade Federal de Lavras). These researchers test the FICs’ products and inform their performance results to the community. These tests are usually made independently or with the sponsorship of the manufacturing companies. Therefore, farms trust these researchers as a less biased opinion and information source, which influence their choice in the farm’s decision-making process. I3, I4 and I5 informed that these influencers are powerful regionally, as farmers value their knowledge of the region.

Second, the technical consultants, according to I2, I3, I4, and I5, are agronomists who are hired to analyze and make recommendations on which products should be bought and how to apply them. Usually, these agronomists are recognized regionally as they also test the products’ performance, independently or with the FIC’s support, and have a strong knowledge of the region’s characteristics regarding soil, climate, and pests. I3 estimated that almost half of the farmers in the state of Mato Grosso hire these technical consultants before making any decisions.

Third, similar to what was found by Kool (1994), the interviewees informed that the distributors’ sales force (cooperative, dealer, or even the manufacturer) still has influence in the farmers’ purchase decision. However, I3 and I5 argue that, currently, this importance is decreasing in view of other influencers as farmers believe the sales force is more biased than other influencers.

Forth, similar as found by Kool (1994), other farmers are also a source of influence. In this case, word-of-mouth plays an important role in farmer’s decision-making and I5 argues that with the social network, it has become even more critical. The interviewee reported that some influencers on Facebook, Instagram, and YouTube are playing an important role in influencing farmers’ decisions.

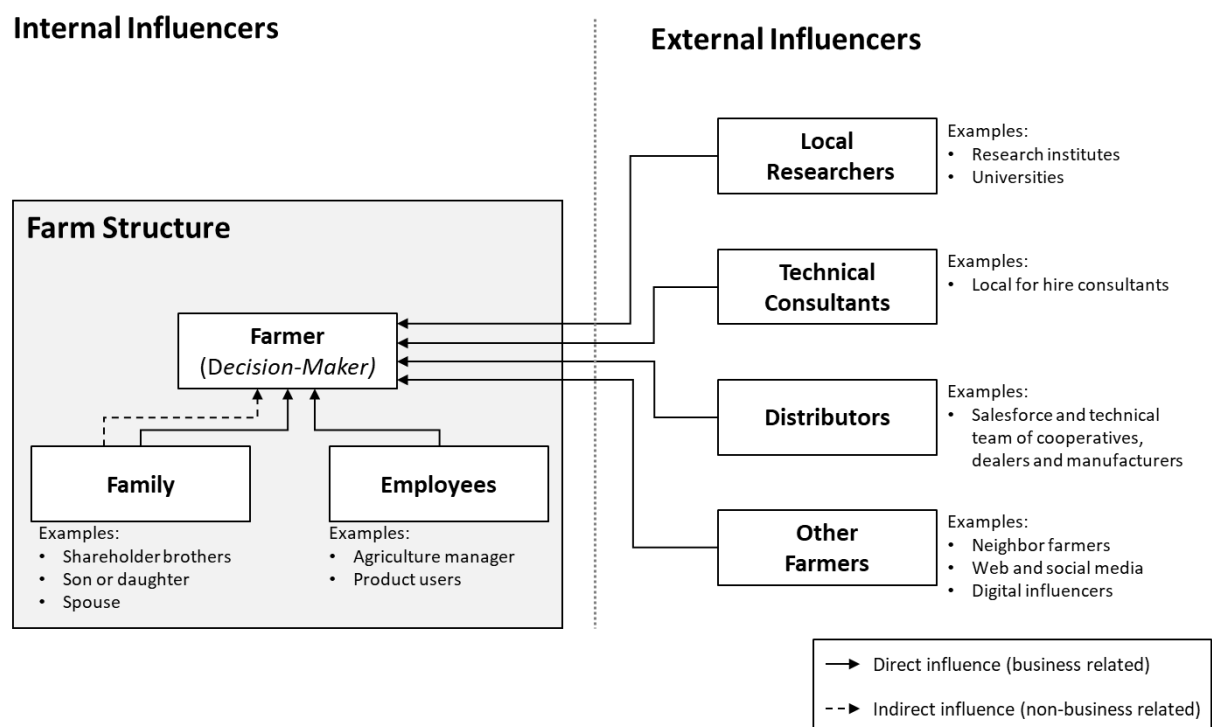
Regarding the internal influence, all interviewees described two types of influence: family and non-family. First, family influence occurs by family members who are related to the farm

business and do not participate in the farm's decisions. For instance, the farmer's brother, who is also a farm's shareholder, can influence the owner in order to buy a particular brand. Additionally, I5 presented an example where the influence occurred in a non-business situation: *"During a manufacturer's annual event, I heard that a farmer's spouse pressured him in order to buy more products from a certain company for the purpose of reaching the sales quota in the relationship program so that she would win the prize, which was a necklace."*

Second, the non-family influence can occur by internal employees influencing the farmers. In this case, the interviewees informed about the role of the agriculture manager and of the employees who apply the products in the crop in influencing the products that can be purchased.

Therefore, family influence can be indirect, not related to the farm business, and direct, related to the farm business. On the other hand, the employees and external influence agents yield a more direct influence, since it tends to be always related to the farm business. Figure 4 summarizes the sources of influence on the farm.

Figure 3 – Sources of Influence in the Farm



Source: Elaborated by the author based on the interviews

4.2.4. Problems and Needs of a Farmer

The interviewees were asked about what the problems and the needs of the farmer were. All interviews presented a similar perspective of this issue, which can be divided into three factors: (1) business' profitability, (2) technical support, and (3) long-term partnership with suppliers.

First, all interviewees presented that the farmer's basic need is related to the business' profitability. In this sense, I2 informed that the farmer is not worried about paying the lowest price for the products, but worried about what he can do to generate the best results and yield better profitability. Additionally, I3 reported that the farmers are worried about productivity, and has been since long before. *"(...) I believe that the farmer has basic necessities, you know? I think that the scale has changed, maybe a farmer with 100 ha cannot do it anymore, he needs 1,000."* (I3). I5 also informed about the farmers' financing needs in order to turn the production feasible.

Second, I2, I3, I4, and I5 informed about the farmer's needs regarding technical support. I2 and I3 presented that the farmer expects knowledge from the FIC in order to use their products and improve their operations on the farm. Additionally, I4 and I5 argued that the farmers expect guarantees from the FICs, that the products they are buying will work as advertised.

Third, I4 and I5 presented that the farmers need to have a long-term relationship with FICs and distributors. For large farmers, I4 and I5 argued that the constant change in the sales force is an obstacle to establishing a solid relationship with farmers. For a small and medium farmer, as presented above, I5 argues that the farmers expect the availability of the sales force in order to address their needs. *"The farmer wants to discuss operation matters with the sales force. They want them to be available, and they don't want to make the decisions alone."* (I5).

4.2.5. Relationship Building with Farmers

All the interviewees informed that the best way to develop a relationship with the growers is through the sales force. In the case of large growers, I4 reported that the salesperson receives incentives to create a healthy relationship with the farmers and that there are cases in which the salesperson visits the farmer weekly and participates in events involving the clients (e.g., farm's annual internal party). I5 informed that the investments made in building relationships with large farmers are high and that it demands time and resources from the FICs. However, the

interviewees presented several other strategies to build a relationship with the farmers that the FICs employ.

Besides the Sales force, I1, I3, I4, and I5 informed that the FICs invest in three other categories to build a relationship: (1) events and trips; (2) exclusive club; and (3) reward programs. First, events and trips are offered to strategic clients in order to connect with them. I5 cited events where companies reward farmers for accomplishments during the crop season and I1 cited an event in which FICs take the most prominent clients to visit different countries. In these efforts, the interviewees recognize the institutional objective of presenting the companies' information but also presented their relationship goals. I5 informed that there is a high social status among growers who go to these events: *"For a farmer, sometimes, it is very important to be invited to the gala dinner of a certain company. Among them, it's a proof of high social status. They prefer to win the benefit by paying more to the manufacturer in products instead of saving money and buying a gala dinner, for example, in Paris. In this last case, they wouldn't be compared to their peers."*

Similar to I5, I1 also cited a case where the farmers' social status appeared: *"A few years ago, our company selected (...) 50 clients from the whole world, with their spouses, and took them to the most expensive hotel in India. The daily room rate of this hotel, if I am not mistaken, is R\$ 50 thousand. (...) It is a palace (...) There was a farmer there who complained: 'But I thought that there was going to be a more selected group of farmers (...) 50 clients is not a selection'. For him, it is not necessarily the type of person, but the exclusivity the company can offer him."*

Second, the exclusive club is a council of clients that the FICs form with the most important clients. I4 informed that of the one thousand growers his company access directly, only fifteen are selected to participate in this group. These fifteen farmers are Brazil's most prominent farmers. Additionally, I3 and I4 informed that these councils of clients meet periodically throughout the year in order to discuss their needs and suggest solutions the company should pursue. I4 also informed that, during these meetings, the farmers value to meet the high-level executives, such as vice-presidents and directors: *"For a farmer, it is important to have the cellphone of our company's Marketing Director. He can tell others that he knows that person"*. Another characteristic of this practice presented by I3, I4, and I5 is that practically the same farmers participate in all councils of clients of each FIC.

Third, the rewards program is a points program in order to offer benefits to farmers who buy the FICs' products. I2 cited some examples in the Brazilian market, such as BASF's ELO program and Bayer's Agroservices. I4 and I5 informed that there are two types of benefits the farmer can reclaim: farm benefits and personal benefits. In the farm's category, the farmer can reclaim products and services that are destined to be used on the farm. For instance, regarding products, there are vehicles, machinery, and equipment. In terms of services, there are training, digital tools, and courses at renowned universities in Brazil.

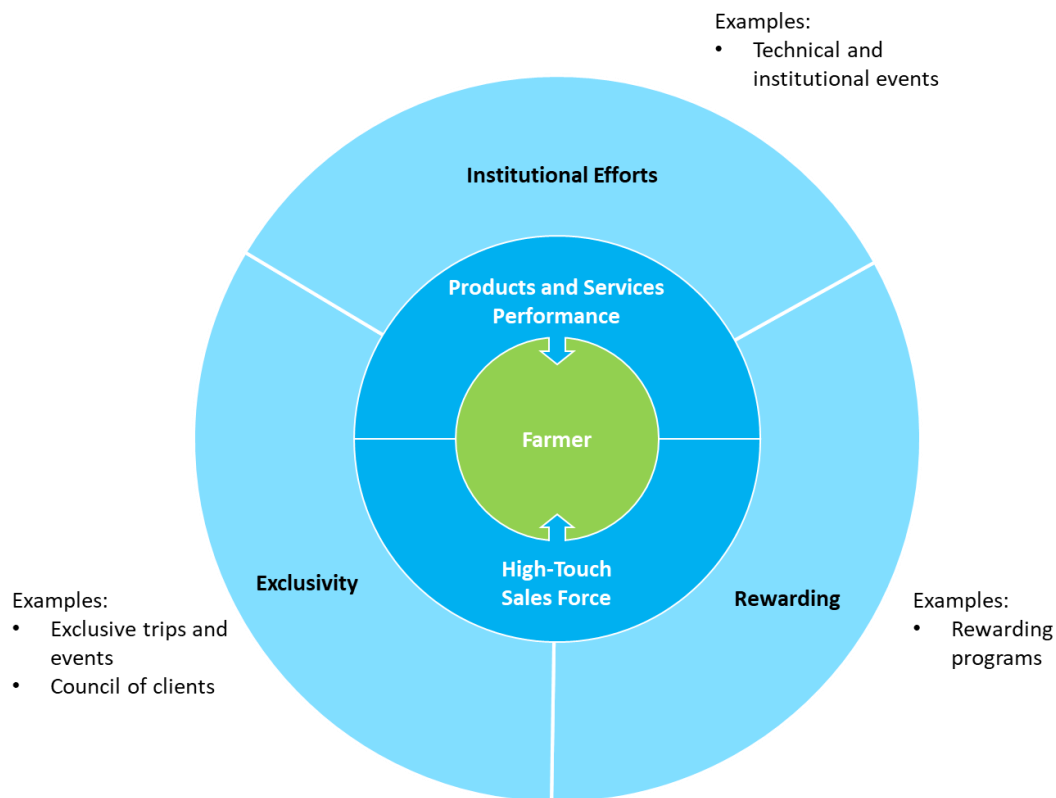
In the personal benefits category, there is a different range of products. I4 and I5 informed that the FICs offer smartphones, home appliances, leisure travel packages, and others. These examples can be confirmed as some companies offer a website for the relationship program (ORBIA, 2019). I4 informed that these benefits are as valuable to farmers as the "professional" benefits. Additionally, the interview informed that these relationship programs started by offering only personal benefits, which were developed through a partnership with large retailers in Brazil. *"We have been discussing recently about removing all these personal benefits from our platform. The problem is that when a farmer reclaims a refrigerator from the program, if the refrigerator breaks, he is not going to call the manufacturer company. He is going to call my sales force to complain about the problem and expect for them to fix it. However, after discussing with our marketing director, we arrived at a conclusion: 'As long as we create a good experience to our farmers, let's keep offering these benefits.'"* (I4).

When asked about the importance of these personal efforts to build the relationship, the interviewees cited their strategic value. I1, I4 and I5 presented similar arguments for the most critical factors for a company to build a relationship. Foremost, there is product performance and relationship with sales force and then the other strategies to build the relationship, such as trips and events, client council, and relationship programs. I5 said, *"There is no use in offering a relationship program without having the right products."* Additionally, I4 informed of a situation where the relationship with a farmer was good, however, after the usage of a product that was not effective, the FIC had to invest a lot of time in order to rebuild the damaged relationship.

In the case of small and medium farmers, the FICs have little contact with the farmers. For them, the relationship is built through the sales force of the cooperatives and dealers. I2 and I5 informed that there are cases in which the same salesperson of a distributor worked for almost

10 years in the same region. Additionally, I5 informed that the FICs also organize some special events and related programs with small and medium farmers, but on a different scale than with large farmers. Figure 5 presents a conceptualization of the pillars of the relationship of companies with farmers.

Figure 4 – Pillars of the Relationship with the Farmers



Source: Elaborated by the authors based on the interviews

4.2.6. Connection and Brand Loyalty

The interviewees were also asked regarding what drives the farmer to connect with the brands of input products. All interviewees informed that they do not believe a farmer connects emotionally with a particular brand as a consumer does. I1 and I3 reported that since the input products are bought for usage on the farm, and not consumed by the farmer, the connection of farmers with companies is weak. However, I2 argued that in the past, there were cases in which growers had a connection with a particular company and had strong loyalty to it. I2 said: “(...) there is that old guy from the Rio Grande do Sul who bought Bayer his entire life (...) and in the future, is he going to keep buying Bayer? Yes. However, this (type of) guy is becoming less

common because if he keeps doing that, he is going bankrupt. (...) There was a guy (...) in Passo Fundo (...) who was a reference in the region and he only bought BASF. All the farmers in the region used to do what he said. Today, he is bankrupt. He got out of the business (...)”.

I1 and I5 argue that when a farmer says he/she likes a particular company, he/she is usually referring to the person from the company with whom he has a contact. However, I3 and I4 informed that they know some cases where a FIC tried to stimulate an emotional relationship of farmers towards the company. Nevertheless, I1 and I3 indicate that this effort sometimes can yield poor results since the farmer does not create this connection.

Regarding loyalty, the interviewees argued that the input market generates low loyalty with customers. Usually, farmers keep buying the products of a particular company because the technical aspects they present are needed for the farm. Additionally, I2, I3, and I5 presented that it is difficult for a single company to have all the products the growers need. However, I2 and I5 argued that in a situation where the performance and economic aspects are met, the farmer's subjective aspects could take place (e.g., preference for relationship programs, relationship with sales force). This finding is similar to what was described by Kool (1994).

4.2.7. Switch Costs of a Farmer

Regarding the switch costs for a farmer, all interviewees presented that it is significantly low. I2, I3 and I5 presented that in the past, the products were more differentiated. Today, the lack of development of new molecules in the crop protection market and the increase in the post-patent market has reduced the switch costs. I2 said: *“(...) Today, if your product is not competitive, it is easy (to switch customers)”*. I3 informed that in the seeds market, the switching costs are higher. The reason for this is that there are few companies in the market offering similar products and the *“differentiation factors of the seeds are intrinsically related to the farm conditions”* (I3).

Additionally, the interviewees presented three factors that can increase the switch costs for the farmer: (1) dependence on distributors, (2) dependence on services, and (3) relationship program preferences. First, I2 and I5 argue that for a farmer to change a specific supplier, it is difficult depending on the available distribution channels. The interviewees informed that there are some cases where a specific dealer is “branded” by a specific FIC. In this situation, the distributor has the goal of selling more than forty percent of the products of a particular brand.

Therefore, if a farmer wants to buy another brand, he will need to change distributors, and according to I2 and I5, this can be difficult in some regions.

Second, I5 informed that the companies are investing in services and digital tools to “*try to lock-in farmers.*” The interviewee cited some tools that some companies are using, such as Bayer’s FieldView and Syngenta’s Strider. In this case, the farmer is tied to the company because he needs to keep buying a specific volume of products in order to keep using these services.

Third, I5 informed that some farmer refuses to change FICs in order to obtain points in the aforementioned programs. However, the interviewee recognizes that this factor comes after the performance and economic aspects of the products.

4.2.8. Perceived Value For a Farmer

The interviewees were asked about the factor the farmers value the most in the commercial relation with input suppliers. All interviewees presented the same perspective, which can be divided into four aspects: (1) functional and economical aspects of solutions; (2) technical support; (3) relationship with the sales force; and (4) personal or emotional aspects.

First, the functional and economical aspects of solutions are related to the technical performance of using a specific product and the economic aspects of it. As already discussed, the farmers first evaluate the technical aspects of a particular product in terms of its utilization. I4 informed that a farmer is going to report a “*bad experience*” (I4) when using a product that does not work as described. Additionally, I5 argued that a farmer first evaluates the products offered by a company, as well as their performance before evaluating other aspects.

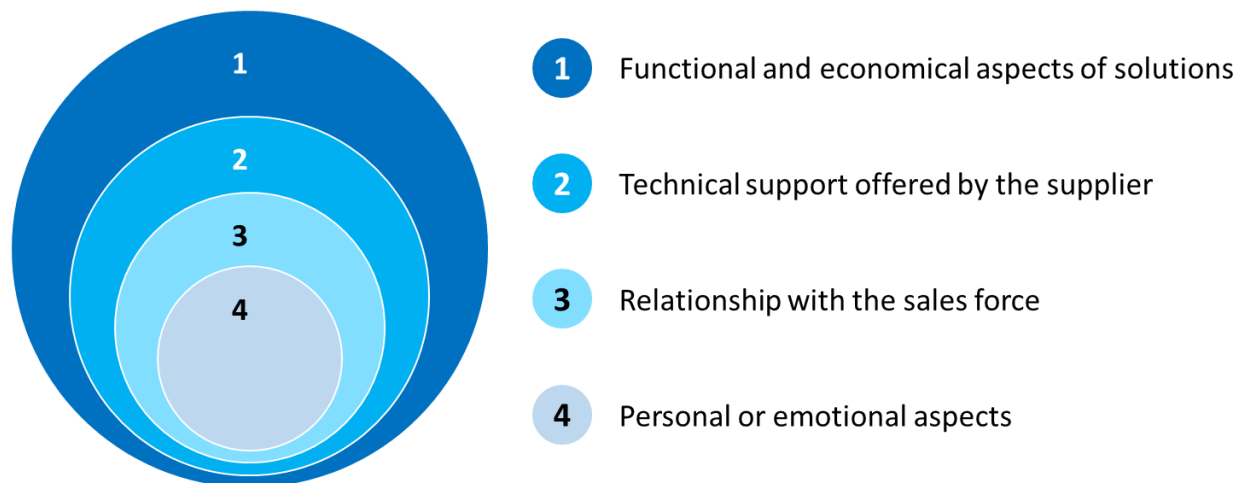
The second factor most valued by the farmers is technical support. I4 presented that if the farmers do not know how to use a product or have a particular problem after using it, they expect the company support to guarantee the desired results. I2 said: “*(The farmer wants) productivity. (...) Product efficiency. Productivity in the seed, a seed with good quality, confidence that if it doesn’t work (...) someone will come and give him assistance. A product that works (...) And orientation about how to use the product.*”

The third factor is the relationship with the sales force. As discussed before, all interviewees have presented the importance of the sales force relationship with farmers. However, I4 and I5

have argued how this relationship comes in second place, after analyzing the product's technical performance. Nevertheless, I4 cited on the growers necessity of having close contact with the salesperson. I4 said: *"It's very important for a farmer to be able to call a salesperson on a Saturday morning because he has a question about something."*

Lastly, the fourth factor is personal or emotional aspects. The importance of relationship programs and other practices to the farmers and FICs was discussed previously. Nonetheless, as affirmed by I1, I3, and I5, this factor is not valuable if the other conditions are not met. Figure 5 resumes the factors that are most valuable to farmers.

Figure 5 – Factors that are Most Valuable to the Farmers



Source: Elaborated by the author based on the interviews

4.2.9. Communication Efforts

The interviewees were asked about the communication efforts the input companies develop with growers. In general, all interviewees informed that the same strategy is employed to target small, medium, and large farmers. The communication strategy can be divided into two categories: traditional and digital.

First, according to I3 and I5, the traditional model of communication with farmers is a strategy that has been employed by the industry for a long time. In this model, the FIC advertises its products through specialized TV (e.g., Canal Rural), radio, magazines, and outdoors. I2 informed that these advertisements occur during the whole year. According to I3, the effectiveness of this communication category is questionable. The interviewee believes that the

main results generated by FICs' marketing investments come from the investments made in regional influencers (researchers and technical consultants).

Second, the digital strategy was recognized as a growing industry trend by all interviewees. In this sense, the interviewees cited the strategy of generating content as the “(...) *farmers are more connected.*” (I2). According to I2, I3 and I5, there are three main areas that the FICs are developing: (1) connecting with the growers; (2) digitalizing some business' aspects; and (3) leveraging digital influencers.

The first area is related to the effort in social media made by companies in order to connect and engage with farmers. I2 reported the strategy of his company of inbound marketing in order to attract farmers to their website. I2 said: “(...) *before we start the idea of inbound (...) my website had an average of 500 visitors per month. Today, we are reaching almost 29 thousand visitors.*” I5 informed that companies, such as Stoller, are investing in their Facebook and Instagram pages in order to generate this engagement with growers.

The second area is the digitalization of some aspects of the business. The I2 and I5 reported that some companies are investing in content, such as videos, webinars, e-books, etc., of technical information in order to educate growers. These efforts, according to I2, were made offline through technical assistants and sales force. However, I2 and I5 also argued that he sees this movement as a compliment and not a substitute for offline efforts.

The third area is leveraging the impact of digital influencers. I3, I4, and I5 informed about some individuals who are becoming digital influencers in agribusiness. These influencers are growers or professionals from the industry who started generating content through social media, such as in Facebook, Instagram, and YouTube. In this sense, I5 sees companies investing in the relationship with these influencers in order to reach farmers in social networks.

4.2.10. Services Offered to Farmers

The interviewees were asked about the service the companies offer to the farmers and this service characteristics. These services are offered after a farmer purchases a certain quantity of products. I5 presented that the services offered to large farmers tend to be more personalized than the ones offered to small farmers. According to the five interviewees, services offered by

the companies can be summarized in five categories: (1) operational services; (2) technical services; (3) intelligence services; (4) financial services; and (5) logistic services.

The operational services are usually offered by distributors and FICs. Usually, these companies offer to develop operations around the farm. For instance, adjust the equipment for the farmers, help them in identifying pests and diseases, and treat the seeds before planting. I5 informed that usually, these services are more commonly offered to small and medium farmers as large farmers usually have dedicated employees to develop these operations.

The technical services are also offered by distributors and FICs. Usually, these services are related to technical analysis using tools that are not generally available on the farm — for instance, precision agriculture tools and soil sample analysis.

The intelligence services, according to I5, is a new category of service that emerged with technological advancements. These services are being offered by the FICs since they demand high investments in technologies, such as digital platforms, satellites, artificial intelligence, and others.

The financial services are services related to agriculture credit and financing. According to I5, for small and medium farmers, these services are usually offered by the distributors. However, for large farmers, these services are offered by the FICs, which have a strong financial advantage.

Lastly, the logistic services are the services of storage and shipping of products. Similar to the financial services, for small and medium farmers, these services are usually offered by the distributors, and for large farmers, these services are offered by the FICs. I4 informed that these services could be personalized depending on the farmer's size. For instance, farmers prefer the products to be stored in the FICs' or dealers' distribution center before shipping them to the farm. This is preferable because of the risks in storing the products on the farm (e.g., robbery, safety issues).

In I5 opinion, the personalization of services that are demanded by large farmers is one of the factors that increase the cost of serving the customer, alongside the related relationship investments. Additionally, as above mentioned, large farmers tend to demand more high-value

services since they have the structure to deal with more basic demands around the farm. Figure 6 summarizes the main findings of the 10 aspects.

Figure 6 – Aspects analyzed in the interviews and main findings

<p>01</p> <p><i>DISTRIBUTION CHANNELS IN AGRIBUSINESS</i></p> <p>Distribution channels are composed by different types and number of agents. However, in some cases the FICs can access the farmer directly.</p>	<p>02</p> <p><i>PURCHASE CYCLE OF FARMERS</i></p> <p>The purchase cycle, on average, takes several weeks, demanding multiple contacts; however it involves few people in the decision process.</p>	<p>03</p> <p><i>DECISION-MAKING OF A FARMER</i></p> <p>The farm business decision is made by few people with informal roles. Usually, the owner makes the decision with the help of family member and employees.</p>	<p>04</p> <p><i>PROBLEMS AND NEEDS OF A FARMER</i></p> <p>Farmers usually have the same problems and needs across the same farm size segment and planted crop segment.</p>	<p>05</p> <p><i>RELATIONSHIP BUILDING WITH FARMERS</i></p> <p>Sales force is the driver of relationship, and each client has a point person (from the FIC, dealer or coop) who has in-depth knowledge of the client's needs and challenges.</p>
<p>06</p> <p><i>CONNECTIONS AND BRAND LOYALTY</i></p> <p>Farmers aren't usually loyal to FIC. Interaction between farmers and salespeople is one of the key factors in influencing the farmer's decision.</p>	<p>07</p> <p><i>SWITCH COSTS OF A FARMER</i></p> <p>Cost of switching is low for the input supplier category. Usually, the products present low differentiation and farmers can change products and brands in each purchase cycle.</p>	<p>08</p> <p><i>PERCEIVED VALUE OF A FARMER</i></p> <p>Farmers perceive value in the technical and product aspects of the proposal, however FICs employ perceptual queues in their proposition in order to connect the farmer with the brand.</p>	<p>09</p> <p><i>COMMUNICATION EFFORTS</i></p> <p>The communication effort is primarily made through the relationship between farmer and salesforce. However, FICs invest in advertising, sales promotion, and public relations in order to reach a large pool of farmers.</p>	<p>10</p> <p><i>SERVICES OFFERED TO FARMER</i></p> <p>Services are usually tailored to the large farmers. To small and medium farmers, services tend to be standardized and offered by dealers and cooperatives.</p>

Source: Elaborated by the author

4.2.11. Business-to-Farmer Marketing

At the end of the interview, the interviewees were questioned about what they understand by the term B2F and the trends related to the farmers and the inputs market. Regarding the trends, I5 presented two possible scenarios: the channels consolidating faster than the farmers or the farmers consolidating faster than the channels.

In the first scenario, I5 argued that the channels consolidations have a tendency to occur faster than the farms' consolidation. This occurs because the farm's consolidation is usually related to the active farmer's generation. Therefore, the old generations tend to retire, and other farms start to consolidate the land. On the other hand, I5 argues that channels consolidation occurs more quickly in two scenarios: the opening of new stores or merging and acquisitions. In this sense, I2, I3, and I5 see a growing trend of private equity firms and Chinese companies pressuring the consolidation in this market.

The second scenario argued by I5 is the farmers' consolidation occurring faster than the channels consolidation. In this case, the interviewee anticipates an increase of the FICs' direct sales importance and intense pressure in the distributors' business.

Nevertheless, regardless of those two scenarios, all interviewees argued that they foresee an increasing trend of professionalization of the farmers. I4 affirmed that he expects the decision-making unit will become more complex, with the inclusion of more agents in the decision process. However, all interviewees informed that they do not perceive large farmers becoming large agricultural companies, even in the long term. I5 presented two main arguments for this: each farm has specific regional characteristics, and the economies of scale in the farm business are limited.

In the first argument, I5 presented that each farm has specific regional characteristics such as weather, soil, pests, and others. Therefore, the management of a particular area can be significantly different from another area, which demands specific knowledge and resources. This argument is similar to what can be found in the work of Macdonald, Hoppe and Newton (2018) that described three agriculture factors that support the family business: First, scale economies matter in agriculture, but they do not require large diversified companies to exploit them. Second, agriculture is a seasonal work and families can reallocate the labor to other tasks to accommodate the seasonality, in contrast to other companies' abilities. Third, most

agricultural activities require an intimate knowledge of local soil, nutrient, pest, and weather conditions.

The second argument presented by I5 is that the economies of scale on the farm can be limited. The coordination of different farm activities is challenging and hardly follows a standardized procedure in terms of time and characteristics. For instance, the application of crop protection products needs to occur in specific weather conditions and the time period in order to optimize the treatment's results. Therefore, it is difficult for an agriculture company to coordinate the limited resources (equipment and labor) to operationalize these activities at the right time in different locations. Moreover, due to land distribution, it is not common to find farms with areas close to each other. Consequently, this adds to the complexity of managing farm operations and puts in jeopardy the scale of the business. *"We analyzed the productivity of large agricultural companies and large farms and found that usually, the large agriculture companies are less productive per hectare than the large farms."* (I5).

When asked what the interviewees understand by the B2F term, each presented a specific definition. With the exception of I5, none of the interviewees had heard the term before the interview. I1 presented the concept of B2F as the relationship between the farmer and the individual who deals directly with him. *"The business-to-farmer is at the end, the last person in the value chain, before reaching the farmer. He is the guy who captures what the market wants and activates the chain that reaches the farmer..."* (I1). For him, the business of the B2F can be both the FIC and the distributor, depending on the channel accessed by the farmer. Additionally, I1 also adds that in his view, the farm is strictly business with a greater complexity regarding the person, the farmer. *"First, I think that people don't understand (...) all farmers are B2B, they are not a person. However, they have a greater complexity. They have their own person, which is a B2C, that has his Siamese brother, which is the farm."* (1).

I2 presented that for him, the B2F is the person who has B2C and B2B behavior. In the B2C behavior, the farmer values the status, among other factors. In the B2B, the farmer is technical and evaluates what is best for his business. *"(...) if it was to build a concept, I believe that (...) it is the person (farmer) who has some B2C behavior, of brand evaluation, (...), of status. However, it is the person who keeps being technical in his purchase process. He is not going to pay (...) much more if he does not see a differential. (...) he has his preferences for the brand, but he will do the calculations (...)"*(I2).

I3 presented that he does not have a clear definition of the B2F, but he thinks it can be related to the direct sales. “(...) *I do not know what it means, I understand as direct sales*” (I3). However, I3 presented that he sees the farmer utterly different from a company. I3 argues that companies are more formalized and structured. However, farmers are much less professional and informal. “(...) *business-business is a price list, product list, and agreed services. Business-farmer (...), each farmer is a farmer (...)* you take 100 farmers, there are 4-5 different segments. *Companies are much more professional. They have processes, they have systems. It is effortless for you to align with them (companies). (...) the farmer is an individual. He wakes up sad, sleeps upset, wakes up happy. (...) The secret in the B2B is (...) the formalization, stable relationships, SLA (service level agreement). Even with a system, it is difficult (to do business), isn't it? Now imagine with individuals, to do that with several individuals*” (I3).

I4 presented that for him, the B2F is a company where the farmer makes the decision for his own company. In this setting, the farmers are searching for more efficiency on the farm; however, they still are more personal and have their own specific preferences. Since I4 did not allow for the interview to be recorded, the transcript of his definition could not be precisely reproduced.

I5 informed that for him, the B2F is a relationship approach of the FICs with the farmer, without excluding the distributors. “*I believe that it is a relationship approach with the farmer, and it does not exclude the distribution channel. The relationship does not mean sales.*” (I5). Additionally, I5 presented that the B2F has the same technical attributes of the B2B, however, with other personal relationships, emotional and social aspects that are usually found in the B2C. “(...) *the B2F (...) will not lose the B2B logic. However, it will loosen or include some relational criteria over some B2B criteria. So, will he (the farmer) have a technical attribute? Of course, he will. (...) Except that he goes beyond these criteria to also consider branding, he will also take into consideration personal relationships. He will also consider the issue of status and social benefits. (...) So, I think (...) the B2F's success will be the company that will be able to match key attributes of the B2B logic without losing relational logic and social benefits (...)*” (I5).

5. DISCUSSION

After presenting the results of the interview, this section discusses the different aspects of the farm and compare it with the B2B and B2C concept. After that, it presents a definition of the B2F concept and discusses some limitations of this research and future ideas for improvement.

5.1. Similarities and Differences Between a Business, Consumer and a Farm

This sub-section compares the interview insights with the aspects of the B2B and B2C found in the literature: (1) Type of clients and buyer's decision-making unit, (2) Number of available buyers, (3) Distribution of buyers in territory, (4) Purchase value of a single buyer, (5) Characteristics of buyers' problems and needs and segmentation, (6) Distribution channels in the market, (7) Purchase cycle, (8) Characteristic of the relationship between buyer and seller, (9) Drivers of the relationship between buyer and seller, (10) Cost of switching a supplier, (11) Characteristics on how the buyer perceives value, (12) Interaction of buyers with sellers' employees, (13) Focus of communication efforts, (14) Characteristic of the sellers' proposition to clients, and (15) Services offered by the sellers to buyers. Some aspects were grouped in order to be analyzed from the point of view of the interviews.

The type of clients, as presented previously, varies from B2B and B2C (KUMAR; PANSARI, 2016; LILIEN, 2016). In the B2B, the customers are recognized as organizations, which is composed of different individuals. In the B2C, the customers are considered individuals or consumers (KUMAR; PANSARI, 2016). According to the five interviewees and past literature, the farmer is considered a business; however, with less complexity than a traditional business.

The number of available clients in B2B tends to be lower than B2C (DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016). Since the clients in B2C are considered a person, naturally, a higher number of individuals will be found than organizations. For the farmers, based on the interviewees and past literature (HARBOR; MARTIN; AKRIDGE, 2008; KOOL, 1994), these definitions can vary. Some farms are composed only by one individual, while others can be composed of a group of them. Kool (1994) has found that a farm decision unit can be composed of 4-5 individuals, which can be a family or a family with few employees. Therefore, it is possible to argue that the number of available clients is less than what found in the B2C literature, however more what found in the B2B literature.

The distribution of buyers in a particular territory is more concentrated in the B2B than in the B2C (DOTZEL; SHANKAR, 2019). The B2B buyers are usually geographically concentrated, and similar companies can be found in the same area. In the B2C, consumers are usually distributed in different regions and do not have the same pattern of concentration as the companies. For instance, in a specific country, it is possible to find a city that concentrates on a particular type of industry (ex. textile, automotive medical). The farmer's concentration pattern, according to interviewees, is similar to what found in the B2B literature. Farmers of the same size and which produce the same crop can usually be found in the same region (EMBRAPA, 2019; IBGE, 2017).

The purchase value of a single buyer can be significantly more significant in the B2B setting than in the B2C setting (DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016). A single organization can expend large amounts of money in a single purchase of products and services. The individual, on the other hand, yields less value per purchase. In this sense, a pool of clients generates sales volume and market share for the seller. The farm also yields a low value per purchase, according to literature (HARBOR; MARTIN; AKRIDGE, 2008) and interviewees.

The distribution channels in the B2B are short, or the seller access directs the farmer if compared to the B2C (DOTZEL; SHANKAR, 2019). For the individuals to buy products or services, there are usually several agents and types of channels, if compared to the B2B. For the farmers, there are also several agents between seller and buyer, according to interviewees and past literature (CÔNSOLI; DO PRADO; MARINO, 2011; HARBOR; MARTIN; AKRIDGE, 2008; NEVES, 2017). Despite in Brazil the direct access of FICs to the farmers being ordinary, some interviewees argued that this pattern is not found in other countries, such as the USA and Europe.

The decision-making unit of a company is usually composed of a web of decisions and influences participants. For the individuals, usually, the own consumer makes the final decision of purchase (DOTZEL; SHANKAR, 2019; LILIEN, 2016). On the farm, the business decision is made by a few people with informal roles. Usually, the owner makes the decision with the help of family members and employees. Some interviewees have reported some farms with a more complex unit of decision; however, they have recognized that these farms are not what usually can be found in the market.

The purchase cycle in the B2B, on average, takes longer, demanding multiple contacts and involves several people in the decision process. For the B2B, the purchase cycle is shorter and usually demands a few contacts with the seller (DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016). The farmers have a similar purchase cycle of the B2B setting. However, it involves fewer people if compared to a traditional business organization, which usually has several roles and formalized procedures.

The characteristics of the relationship between the buyer and seller in the B2B tend to be complex, interpersonal, and interdependent (DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016). In the B2C, the individuals can be emotionally committed to an FIC and can identify with their purchase. In the farms, the relationship is not complicated since the seller usually has one person to maintain contact. Despite the relationship being primarily functional, the emotional and social criteria of farmers can affect the relationship with suppliers, according to interviews and past literature (KOOL, 1994).

In the B2B, the drivers of the relationship with the buyer are usually the salesperson. In this case, each client has a point person who has in-depth knowledge of the client's needs and challenges. In the B2C, the product or service offered by the companies is the drivers of relationship with the consumer (DOTZEL; SHANKAR, 2019; PICK; EISEND, 2013). According to the interviews, the farm has a similar characteristic of the B2B setting, and all interviewees have emphasized the importance of the relationship of suppliers with farmers.

The cost of switching suppliers is higher in the B2B due to the accumulated knowledge and relationship with a supplier. In the B2C, customers are easily influenced and can change suppliers quickly (LILIEN, 2016). For the farms, the cost of switching is low for the input supplier category. Usually, the products present low differentiation, and farmers can change products and brands in each purchase cycle.

In the B2B setting, organizations perceive value in the practical use of the products and services, and it can be generally quantifiable (KUMAR; PANSARI, 2016). Consumers, on the other hand, tend to perceive more value in the brand relationship. According to the interviews, farmers primarily perceive value in the use of products and services. However, support from the seller and brand relationship becomes essential as soon the perceived value in use is met. This argument is similar to what was found in past literature (KOOL, 1994).

The interaction with the seller's employees is a critical factor in the B2B transaction. However, for the B2C, the employees do not play a vital role in the decision-making process (DOTZEL; SHANKAR, 2019; KUMAR; PANSARI, 2016). For the farmers, as discussed above, interactions with the salespeople are one of the critical factors in influencing the decision of the farmer. The salesperson's attitude, behavior, and knowledge can be a key differentiating factor for the seller.

The focus of communication efforts in the B2B is based on the relationship-building between buyers and sellers. For individuals, this effort is based on advertising, sales promotion, and public relations to reach a large market (LILIEN, 2016). In the farm, the communication effort is primarily made through the relationship between buyer and seller. However, sellers invest in advertising, sales promotion, and public relations in order to reach a large pool of farmers.

The proposition of the seller in the B2B tends to be technical, while in the B2C setting are more perceptual (DOTZEL; SHANKAR, 2019; LILIEN, 2016). In the farm, propositions to farmers are technical, product-wise. However, suppliers employ perceptual cues in their proposition in order to connect the farmer with the brand. The effectiveness of these cues has been reported by the interviewees and past literature (KOOL, 1994).

In the B2B, the services are more tailored to the buyers' needs, while in the B2C services are generally standardize (DOTZEL; SHANKAR, 2019). For the farmer, services are usually tailored to the large ones, while for small and medium farmers, services tend to be standardized. From the perspective of the interviewees, the level of customization of the services is related to the economic importance of the single client. Therefore, the farmer that yield low economic power will receive less customized services than the ones that offer higher economic power.

The problems and needs of organizations are usually similar between companies of the same industry and which compete in the same segments. On the other hand, the problems and needs of individuals are different. Usually, consumers can be categorized according to segments of their problems and needs (DOTZEL; SHANKAR, 2019). In the farm, farmers usually have the same problems and needs across the same farm size segment and planted crop segment, similar to the B2B setting.

Table 9 summarizes the comparison of the perspectives.

Table 9 - Differences in B2C, B2B and B2F marketing (continues)

Characteristics	B2B	B2C	B2F	Examples of B2F
Type of buyers and decision-making unit	Customers are organizations that have a web of decisions and influence participants.	Customers are consumers, or an individual person, who decide the purchase.	The farm is an organization. The farm business decision is made by a few people with informal roles. Usually, the owner makes the decision with the support of few other people.	Farmer runs the farm business with the help of family members and employees.
Number of available buyers and purchase value of a single buyer	Low number of available clients in a specific region that yield high value per purchase. A single client expends large amounts of money in the single purchase of products and services.	High number of available clients. Each person can be considered a consumer. A single consumer yields low value per purchase. A pool of clients generates sales volume and market share for the seller.	There is a large number of farmers in the market with a relatively small unit (farms), while others have a relatively larger unit. A single farmer can yield high or low value per purchase. A farmer with small land size yields low value per purchase, requiring a more extensive channel structure. A farmer with larger land size yields high value per purchase, requires less extensive channel structure and be accessed directly by FICs.	Farmers of fruits and vegetables usually have small land size and purchase low volumes of products. These farmers are usually at least two agents away from the FICs. However, some specific soybean farmers have larger land size and purchase high volumes of products. These farmers usually can by products directly from FICs.

Table 9 - Differences in B2C, B2B and B2F marketing (continues)

Characteristics	B2B	B2C	B2F	Examples of B2F
Distribution of buyers in the territory	Clients are geographically concentrated. Similar companies can usually be found in the same area.	Clients are not usually concentrated in a geographical area. Consumers are usually distributed in different regions.	Distribution is concentrated. Similar farms (farm size and crop planted) can be usually found in the same region.	Soybean farmers are concentrated in specific states (e.g., Mato Grosso, Mato Grosso do Sul), while sugarcane farmers are concentrated in other regions (e.g., São Paulo).
Characteristics of buyers' problems and needs and segmentation	Problems and needs are similar between companies of the same industry and compete in the same segments. Customers are usually segmented by firm size.	Different types of problems and needs among customers. Usually, consumers can be categorized according to behavioral aspects.	Farmers usually have the same problems and needs across the same farm size segment and planted crop segment. However, farmers can also be categorized according to behavioral aspects.	Soybean farmers in the same region can have problems with specific pests and diseases that other farmers don't have. Furthermore, FICs try to segment farmer according to their buying behavior (e.g., price, convenience, performance).
Distribution channels in the market	Short or direct distribution channels.	Distribution channels are composed of different types and number of agents.	A distribution channel is composed of different types and numbers of agents. However, in some cases, the suppliers can access the farmer directly.	In cotton almost all farmers purchase directly from the FICs. In fruits and vegetables, farmers usually purchase from retailers.

Table 9 - Differences in B2C, B2B and B2F marketing (continues)

Characteristics	B2B	B2C	B2F	Examples of B2F
Purchase cycle	Purchase cycle, on average, takes longer, demanding multiple contacts and involves more people in the decision process.	The purchase cycle, on average, is shorter, demanding few contacts and usually involves a single person.	Purchase cycle, on average, takes longer, demanding multiple contacts. However, it involves a few people in the decision process.	Farmers need to consider at least three to four suppliers before deciding the purchase. Furthermore, the decision process start after a crop season has ended.
Characteristic of the relationship between buyer and seller	The relationship between businesses is complex, interpersonal, and interdependent.	Customers can be emotionally committed to a supplier and can identify with purchases and firms.	Relationship is not complicated since the seller usually has one person to maintain contact. Despite the relationship being primarily functional, the emotional and social criteria of farmers can affect the relationship with suppliers.	Farmers choose primarily based on functional aspects. However, FICs invest in several practices to create emotional and social involvement with farmers (e.g., travels, events, prizes).
Drivers of the relationship between buyer and seller	Sales force is the driver of the relationship, and each client has a point person who has in-depth knowledge of the client's needs and challenges.	The product or service offered by the firm is the driver of the relationship with the consumer.	Sales force is the focal point of the relationship, and each client has a point person who has in-depth knowledge of the client's needs and challenges.	Farmer is usually serviced by a single salesperson from the FICs or dealers.

Table 9 - Differences in B2C, B2B and B2F marketing (continues)

Characteristics	B2B	B2C	B2F	Examples of B2F
Cost of switching a supplier	The cost of switching is higher due to the accumulated knowledge and relationship with a supplier.	Customers are more easily influenced to switch suppliers.	The cost of switching is low for the input supplier category. Usually, the products present low differentiation, and farmers can change products and brands in each purchase cycle.	Input products are expandable goods. Usually, the same products is supplied by more than one FICs.
Characteristics of how the buyer perceives value	Organizations perceive value in use, and it is generally quantifiable.	Consumers perceive value in brand relationship.	Farmers primarily perceive value in use. However, support from the seller and brand relationship becomes essential as soon the perceived value in use is met.	FICs invest in several marketing practices to create a better experience for the farmers (e.g., support, events, loyalty programs)
Interaction of buyers with sellers' employees	Interaction between customers and employees is a critical factor in influencing decisions. Employee's attitudes, behavior, and knowledge can be critical differentiating factors for the firm.	The employee is not a critical factor in the customer's decision-making process.	Interaction between farmers and salespeople is one of the critical factors in influencing the decision of the farmer. The salesperson's attitude, behavior, and knowledge can be a key differentiating factor for the seller.	FICs usually select their best salespeople to deal directly with the farmers (i.e., key accounts).

Table 9 - Differences in B2C, B2B and B2F marketing (concluded)

Characteristics	B2B	B2C	B2F	Examples of B2F
The focus of communication efforts	The communication effort is on relationship building between buyers and sellers.	The communication effort is on advertising, sales promotion, and public relations to reach a large market.	The communication effort is primarily made through the relationship between buyer and seller. However, sellers invest in advertising, sales promotion, and public relations in order to reach a large pool of farmers.	FICs, invest in online (e.g., social media) and offline communication channels (e.g., magazines, outdoors, events) in order to reach specific or a large pool of farmers.
Characteristic of the sellers' proposition to clients	Propositions to organizations are technical.	Propositions to consumers are perceptual.	Propositions to farmers are technical, product-wise. However, suppliers employ perceptual cues in their proposition in order to connect the farmer with the brand.	FICs products advertising focus on technical aspects. However, FICs invest in several marketing practices to engage with farmers (e.g., events, travel, loyalty programs).
Services offered by sellers to buyers	Services are tailored to buyer needs.	Services are generally standardized.	Services are usually tailored to large farmers. To small and medium farmers, services tend to be standardized.	FICs offer services to farmers they deal directly. However, small and medium farmers can have standard services offered by dealers.

Source: Elaborated by the author

5.2. Business-to-Farmer Marketing

Now, this sub-section tries to advance in the definition of the term B2F marketing based on the interviews and past literature. First, this study suggests a definition of the terms 'Farmer' and 'Business' of B2F Marketing. The term 'Farmer' in the B2F should refer to all farmers in the market, considering the definition of the interviewees of small, medium, and large farmers. However, it can be argued that the large agriculture companies can sometimes be different from the traditional farmer since it has been found they act as a more traditional business with formalized procedures, roles, and areas. The term 'business' in the B2F should refer to the companies that have direct or indirect contact with farmers in commercial transactions. Therefore, FICs and distributors should feel the category of 'business' since they provide products and services to a farmer and employ efforts to build a relationship with them. In addition, it was found through the interviews that similar activities to reach the farmer are employed by both FICs and distributors, regardless of the type of the farm (small, medium or large).

Finally, the study suggests a definition for the term Business-to-Farmer marketing. However, first, it reviews the definition of traditional marketing, B2C marketing, and B2B marketing. First, AMA's (2017) last definition defines the traditional marketing as the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large. Second, despite AMA not having established a definition for B2C marketing and B2B marketing, some studies try to discuss these concepts. For the B2C marketing, Shankar et al. (2011) define it as the principle of creating awareness with a dominant focus on brand, primary to target the consumer in consumption mode, using pull and push strategies. For B2B marketing, Lilien (2016) defines the term as the full range of value-generating relationships between businesses, government agencies, and not for profit organizations and the many individuals representing those organizations. This study attempts to define the B2F marketing as the set of activities that goes from business to farmers in order to generate value before, during and after the farm processes and operations, considering the functional aspects of the farm business, as well the emotional and social aspects of the farmer. Table 10 summarizes the definitions.

Table 10 - Definitions of the traditional, B2C, B2B and B2F marketing

Dimension	Definition	Source
Traditional Marketing	Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.	(AMA, 2017)
Business-to-Consumer Marketing	B2C marketing is the principle of creating awareness with a dominant focus on brand, primary to target the consumer in consumption mode, using pull and push strategies.	(SHANKAR et al., 2011)
Business-to-Business Marketing	B2B marketing is the full range of value-generating relationships between businesses, government agencies, and not for profit organizations and the many individuals representing those organizations.	(LILIEN, 2016)
Business-to-Farmer Marketing	B2F marketing is the set of activities that goes from business to farmers in order to generate value before, during, and after the farm processes and operations, considering the functional aspects of the farm business, as well the emotional and social aspects of the farmer.	Author

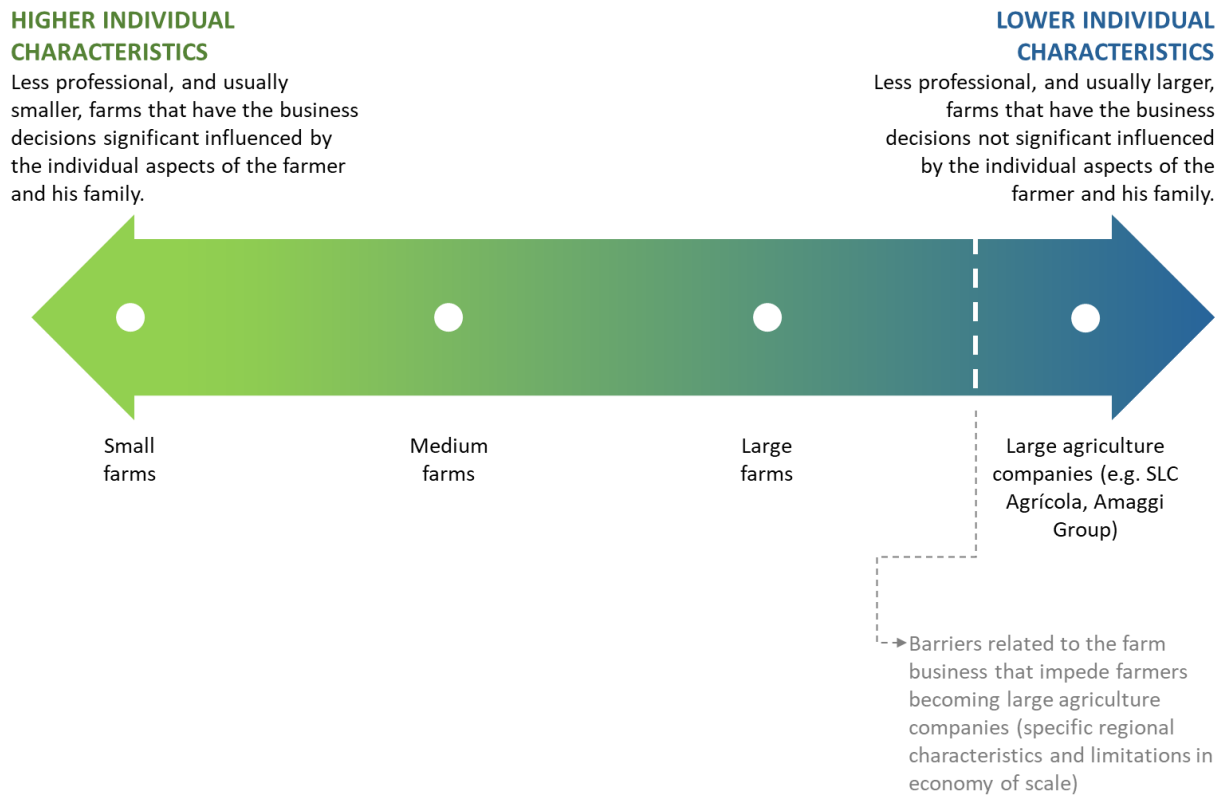
Source: Elaborated by the author

Furthermore, considering the professionalization theme discussed by the interviewees, it can be argued that there is a continuum where the individualities of the farmer are more pronounced than others. On one side of this continuum, there are less formalized and smaller farms, in which, usually, the individualities of the owner have a stronger influence on the farm decision. Some interviewees informed that there are cases where some farms are not registered as a legal entity. Thus, all the transactions are registered and made by the single person who 'is the farm.' On the other side of the continuum, there are more professional farmers; usually, large farmers that have more structure to act as a business. However, as presented before by the interviewees and literature (MACDONALD; HOPPE; NEWTON, 2018), these farms face significant barriers to become a large agricultural company (e.g., SLC Agrícola, Amaggi). The latter are more formal and have more aspects of a traditional business than a farm. However, large farms tend to

assimilate more organizational characteristics, despite not becoming a large agricultural company.

The conceptualization of the continuum can be found in figure 7.

Figure 7 - Continuum of the Farm Characteristics



Source: Elaborated by the author

6. CONCLUSION

6.1. Theoretical Conclusions

This study has the objective of defining what business-to-farmer marketing is, investigate what its characteristics are, and compare it with B2B and B2C marketing. It has focused on the exchange of goods and services between input companies and farmers. To achieve the proposed objective, this research has developed five semi-structured interviews with executives from the FICs and experts. A similar approach has been used by other authors in a similar research objective (JOSEPHSON et al., 2019).

For this study objective, it was found the definition of B2F as the set of activities that goes from business to farmers in order to generate value before, during and after the farm processes and operations, considering the functional aspects of the farm business, as well the emotional and social aspects of the farmer. These characteristics impact the marketing practices of the firms dealing with farmers if compared to traditional markets. For the three specific research questions, their answers can be summarized below.

First: *How does input suppliers recognize the B2F marketing?* It was found that the input suppliers recognize the B2F marketing. They define the farm as a significantly different type of business that can have some individual aspects of the behavior of the farmer and his family. This characteristic increases the complexity of the exchanges of goods and services if compared to traditional business (B2B).

Second: *What are the marketing practices of input companies with farmers that allows the advance towards a B2F marketing?* It was found that the input companies can employ marketing practices from both B2B and B2C settings in order to reach the farmer. Therefore, it can be argued that this unique characteristic justifies the existence of B2F marketing, in which the definition has been conceptualized in this work.

Third: *How B2F marketing is different when compared to B2B and B2C marketing?* It was found that B2F marketing can be similar to both B2B and B2C in different aspects. These similarities and differences are summarized in Table 9.

6.2. Research Propositions

Having proposed some major constituents of B2F marketing, propositions regarding the farm business are set forth. Farmers can be different from managers from traditional business. Understanding these differences is necessary for firms to properly segment customers and appropriately target them with marketing strategies to ultimately maximize the allocation of their resources.

6.2.1. Differences from the Farm Business to the Traditional Business

An average small size business can share the same characteristics of the average small sized farm. As the farmer is the sole owner of the farm and the decision is made by a few people with informal roles, the small size business owner (e.g., mom-and-pop stores) can manage the business in such a manner. However, different than the former, the farmer business presents several differences than a traditional business. First, agriculture is a business dependent on uncontrollable factors, such as weather, regional environment characteristics, commodity prices, and direct government interventions. Those factors create uncertainty that not usually influence other businesses. Therefore, this uncertainty demands specific knowledge and practices from farmers not required in traditional business (e.g., risk management, operational expenditures, financing).

Second, unlike traditional businesses, farmers are usually tied to the land. If a traditional business goes bankrupt, the owner can open a different activity in another location. The farm business, however, is intrinsically linked with the land. The land is usually an asset owned by the farmer and is a limited resource that cannot be moved. Therefore, the manager of this business is dependent on the specific local characteristics of the land in order to produce the desired product.

Third, the farm business faces different barriers to scale gains than traditional businesses. As discussed in previous sessions, in agriculture, the labor requires intimate local knowledge of the production environment, the work is highly seasonable, and the scale economies are not so extensive (MACDONALD; HOPPE; NEWTON, 2018). These features that create constraints for the scale gains in agriculture are not found in tradition businesses. Nevertheless, this topic does not refute the large body of studies in the farm business consolidation. Indeed, it brings insight to the extent of the consolidation in agriculture. Proposal 1 is proposed:

Proposal 1: The farm businesses are intrinsically different from traditional businesses.

6.2.2. Influence of Non-Economic Factors

Although both industrial and final consumer buying process is influenced by economic and non-economic factors, it can be discussed to the extent these influences occur. Foxall (1979) argues that economically rational decision and psychological or “irrational” choices may represent the polar extremes of a continuum, which is based on a range of economic, social and psychological influences. For the farm business, two factors can be presented in order to argue that the farmer's decision can travel to the “irrational” side of this continuum. First, in the informal decision-making unit of a farm, the farmer or his family are the agents with almost absolute control of the farm's decision. In this situation, the lack of formalized processes and roles can be one of the factors that allow the decision process to be influenced by non-economic goals.

Second, the farmer usually participates in an informal group with other farmers that have similar characteristics of production (i.e., same planted crops, farms in the same region, same suppliers). This group may generate a sense of participation in the farmer that may influence his decision around the farm, such as product choices, innovation adoption, the decision of suppliers, and techniques preference. This type of influence has been extensively explored in the consumer behavior literature (HIBBERT; PIACENTINI; HOGG, 2012; KLEIN; SMITH; JOHN, 2004). Proposal 2 is proposed:

Proposal 2: The farmer's decision can be influenced by non-economic factors (e.g., social and emotional factors).

6.2.3. Farm Size and Influence of Non-Economic Factors

Larger farms may present several features that are different from smaller farms. The latter may have more capital which can be invested in organized processes, division of the labor, and the development of a formal structure. Thus, a larger farmer may interact with companies in a more business-like manner (HARBOR; MARTIN; AKRIDGE, 2008). Therefore, it can be argued that the decision in the more organized farms may be less influenced by the farmer's non-economic goals than the less organized farms. Proposal 3 is proposed:

Proposal 3: The larger farms receive less influence from non-economic factors (e.g., social and emotional factors) than smaller farms.

6.3. Framework for Future Studies

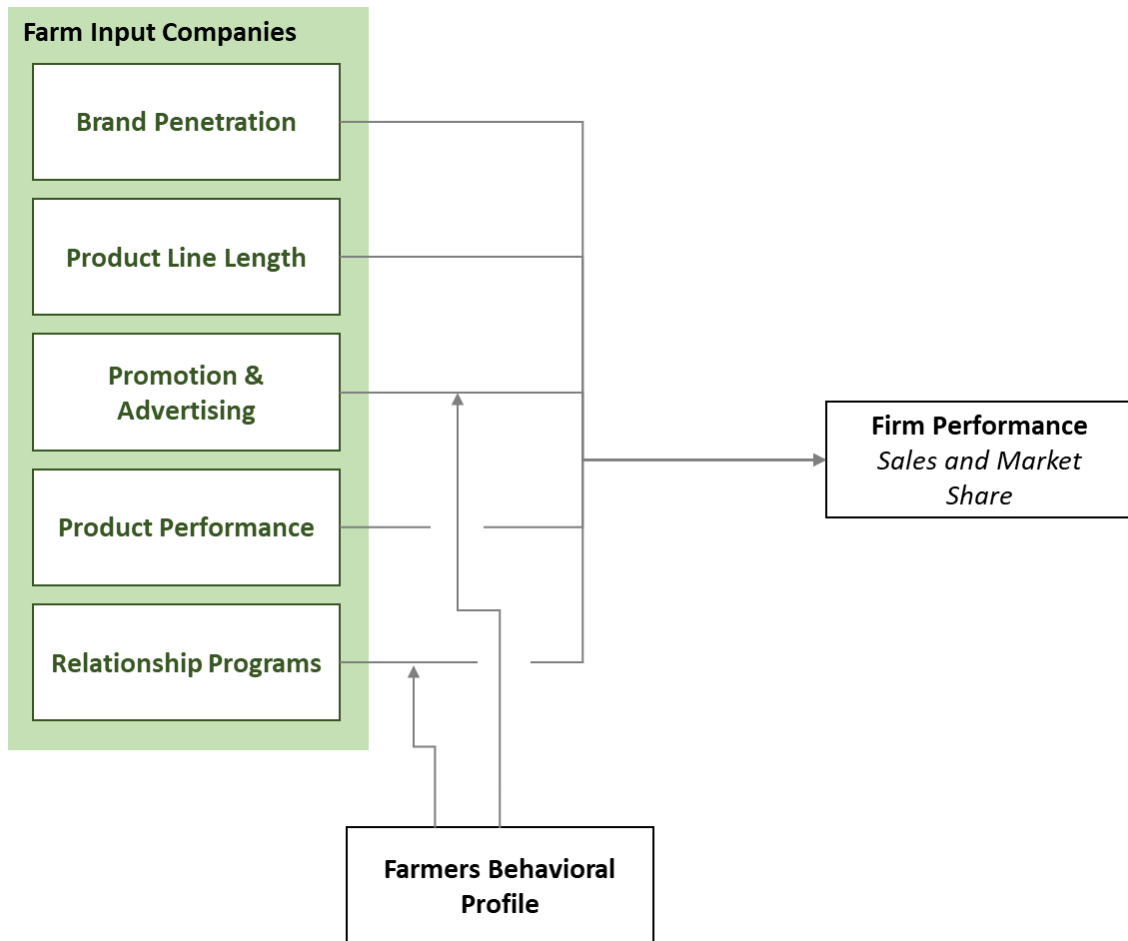
According to the findings of this research, a draft of a framework to measure the firm performance is proposed for future studies (Figure 8). This draft was built based on the variables that seem to have an influence on firm performance. Six variables were analyzed: 1) Brand Penetration; 2) Product Line Length; 3) Product Performance; 4) Promotion & Advertising; 5) Relationship Programs, and 6) Farmers Behavioral Profile.

Brand Penetration is a measure defined as the number of people who buy a specific brand at least once in a given period, divided by the size of the population (FARRIS et al., 2009). Line Length is a measure of the number of SKUs of a certain brand (ATAMAN; VAN HEERDE; MELA, 2010). Promotion & Advertising can be measured as the amount of spending in monetary value (ATAMAN; VAN HEERDE; MELA, 2010). The positive effect of these three measures on firm performance has been extensively studied by several authors in literature.

Product Performance, Relationship Programs, and Farmers Behavioral Profile are other proposed measures. Product Performance is a measure defined as the evaluation of the farmers regarding the performance of a certain product. Relationship Programs is a measure defined as if the company has or not a relationship program. Farmers Behavioral Profile can be measured as types of segments of farmers. Several researchers have proposed different methods of farm segmentation (BOEHLJE; DOEHRING; SONKA, 2005; BURGERT, 2011; FEENEY; BERARDI, 2013).

The framework proposes that Farmers Behavioral Profile may act as a moderator in the effect of Promotion & Advertising and Relationship Program in the firm performance. This can occur as some farmers may have different profiles than other, which can then affect the influence of these variables.

Figure 8 – Draft of a framework for future studies



Source: Elaborated by the author

6.4. Limitations and Research Directions

Clearly, the relation between business and business and business and consumers present many nuances. These are difficult to capture, and the simplification of these relations may neglect aspects that would create an artificial representation of the phenomenon. However, the simplification of the characteristics of B2B marketing and B2C marketing was useful in this research in order to explore and discuss the aspects of B2F marketing. Without it, it would be fairly difficult to explore and advance towards the concept of B2F marketing.

Furthermore, this research acknowledges four other limitations and recognize them as opportunities for future studies. These limitations are related to the extensiveness of agribusiness sectors explored and the lack of empirical support in this study. First, this research captured only the perspective of the input sector in agribusiness. Although the inputs are the

most significant expenditure on the farm and that the interviewed executives were selected from different companies in the market, it can be argued that other suppliers can offer complementary insights for this research. For instance, how the characteristics change when commercial transactions are analyzed between machinery manufacturers and farmers? Additionally, it would be interesting to understand how the findings change in other contexts. For instance, how these characteristics differ, considering the different cultural aspects of other countries? Even so, there is evidence that the farmer around the globe presents similar characteristics, it would be interesting to observe the same type of work on other important markets, such as the USA, Europe, and China.

Second, this research is limited in offering empirical support for the discovered findings. The approach of the qualitative method was useful in view of the scarcity of literature around the theme. This similar approach was used by other authors in a similar research objective that faced the same constraints (JOSEPHSON et al., 2019). However, due time, scope, and objective, this investigation did not pursue an empirical observation to justify the findings obtained in the qualitative approach. Therefore, this research suggests that the next step is to develop a hypothesis and test in an empirical setting.

Third, this study has found the importance of some emotional and social factors in the farmer's decision making. However, the understanding of the extent of this importance has not been one of the objectives of this research. Therefore, this work suggests further analysis in this area to explore what emotions can influence the business decisions of the farmer.

Fourth, as presented in this research, consolidation is a trend that is currently impacting all agents in the agribusiness, and it has not been one of the objectives of this research. Thus, to understand the impacts of consolidation in the changes of the farmer's behavior would be an interesting research objective, with relevant marketing literature and practice implications.

6.5. Contribution to the Marketing Literature

This study provides findings and contributes to the marketing literature in several aspects. First, this study provides a framework to analyze B2B marketing, B2C marketing, and B2F marketing. Although this framework has simplified some aspects of these relations, it is useful to understand the many characteristics and compare them through different lenses.

Second, this study explores a new concept of exchange of goods and services between different agents, which is different from the business-to-business, business-to-consumer, and the recent business-to-government (JOSEPHSON et al., 2019). Although the B2F has emerged as a managerial practice among FICs, the characteristics of this concept have not been explored by the marketing literature.

Last, this study expands the field of the marketing study of the upstream of the agribusiness value chain, where several authors have recognized the scarcity of research (HARBOR; MARTIN; AKRIDGE, 2008; MALAK-RAWLIKOWSKA; MILCZAREK-ANDRZEJEWSKA, 2016; PARK; MISHRA; WOZNIAK, 2014).

6.6. Implications for Marketing Practitioners

From the perspective of practitioners, this study provides important implications for companies that operate in the agribusiness industry. As discussed before, the farm is a business that can often present the individual aspects of the farmer and his family. Therefore, companies that exchange goods and services with farmers should better allocate resources in different marketing strategies in order to be more effective in this industry. For instance, considering that farmers primarily evaluate the functional and economical aspects of the products, companies should prioritize investments in assortment and services before investments to engage with farmers. As presented by different interviewees, firms in this industry fail to provide the necessities of the farmers (productivity and support) and try to invest in areas to develop the relationship. As discussed before, the relationship with a brand can be jeopardized in view of a problem in the performance of a specific solution.

On the other hand, after the functional aspects have been met, companies can allocate resources to build on the emotional and social aspects of the farmers. In this context, there are several business cases that can be observed in the B2C markets. For instance, companies can invest in some practices of relationship and loyalty program similar employed by FICs with consumers. In addition, firms in agribusiness can invest in the engagement with farmers, which has been proven scientifically that increases the performance metric of companies (KUMAR, 2018; KUMAR; REINARTZ, 2016).

Lastly, although the B2F has emerged before as a managerial practice among companies in agribusiness, the development of a framework to analyze it and compare it with the B2B and

B2C marketing can help companies better understand and direct their marketing practices. Therefore, to review the marketing effort allocation with this framework in mind can be an interesting strategy for companies dealing directly or indirectly with farmers.

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APPENDIX

Appendix A – Invitation Letter (in Portuguese)

Appendix B – Questionnaire for Farm Input Companies (in Portuguese)

Appendix C – Questionnaire for Experts (in Portuguese)

APPENDIX A – INVITATION LETTER (IN PORTUGUESE)

CARTA CONVITE PARA PARTICIPAÇÃO DA PESQUISA

São Paulo, __ de _____ de ____

Prezado Sr.(a) _____

Venho por meio desta carta, convidá-lo(a) a participar do estudo “*Business-to-Farmer: Evidências da Indústria de Insumos Agrícolas*”. O objetivo é entender, do ponto de vista científico, como as indústrias analisam o relacionamento com o produtor rural e tentar identificar as principais características dessa relação. Dessa forma, gostaria de pedir cerca de 40 minutos do seu tempo para conversarmos sobre esses pontos. Este estudo é orientado pelo Prof. Dr. Leandro Angotti Guissoni e Prof. Dr. Marcos Fava Neves, professores da Fundação Getúlio Vargas (FGV-EAESP).

Juntamente com o senhor(a), outras indústrias e especialistas de mercado estão sendo entrevistados. Na parte da indústria, nosso objetivo é entender o ponto de vista dos departamentos responsáveis por desenvolver ações com produtores rurais. Já aos especialistas, referimos a consultores de mercado com experiência de pelo menos 20 anos no setor do agronegócio.

É importante ressaltar que qualquer informação coletada no estudo será confidencial e não será divulgada de forma integral por qualquer meio, acadêmico ou não. Contudo, ressalto que, assim que for concluída a pesquisa, iremos enviar um sumário executivo com o método e os principais resultados do trabalho. Esperemos que esses resultados possam trazer insights interessantes que possam ser aplicados no ambiente gerencial da sua empresa. Aguardo o retorno e agradeço a atenção.

Atenciosamente,

Rodrigo Lourenço Farinha

Aluno Mestrado em Administração de Empresas, Fundação Getúlio Vargas (FGV-EAESP)

Prof. Dr. Leandro Angotti Guissoni

Professor, Fundação Getúlio Vargas (FGV-EAESP)

Fellow of the Darden Center for Global Initiatives

Prof. Dr. Marcos Fava Neves

Professor, Fundação Getúlio Vargas (FGV-EAESP)

Professor, Faculdade de Economia, Administração e Contabilidade de Ribeirão Preto (FEA-RP/USP)

APPENDIX B – QUESTIONNAIRE FOR FARM INPUT COMPANIES (IN PORTUGUESE)

ROTEIRO DE ENTREVISTA – INDÚSTRIA

ENTREVISTA N°:

DATA:

LOCAL:

PERMISSÃO PARA GRAVAR:

OBJETIVO: Identificar, na perspectiva da indústria e especialistas de mercado, a visão sobre a existência do B2F (Business to Farmer), identificar quais são as características dele e quais as práticas empregadas pela indústria de insumos agrícolas tendo em vista o B2F.

PERFIL DO ENTREVISTADO

Informação Sobre o Entrevistado:

- Nome:
- Ocupação:
- Experiência na ocupação:

Informações Sobre a Empresa (obtidas previamente pelo entrevistador):

- Nome da empresa:
- Informações básicas:
 - Área de atividade:
 - Mercado alvo:
 - Produtos e serviços:

QUESTIONÁRIO

Definição de termos:

- PRODUTORES VENDA DIRETA = Produtores grandes que compram diretamente da indústria
- PRODUTORES EM GERAL = Produtores médios e pequenos que compram de canais de distribuição (ex. revendas e cooperativas)

1. Canais de Distribuição:

1.1. Quais são os canais que sua empresa vende insumos agrícolas?

1.1.1. Qual é a participação dos canais nas vendas?

1.2. Quais são os pontos de contato que a sua empresa tem com os produtores (venda de produtos, programa de relacionamento, serviços, etc.)? Como esses contatos ocorrem durante a safra?

1.3. Sua empresa vende produtos para PRODUTORES VENDA DIRETA?

1.3.1. Se sim, quais os motivos para vender diretamente não passando pelos canais?

1.3.2. Quais características um produtor precisa ter para ser acessado diretamente pela empresa?

1.3.3. Como ela faz esse acesso?

1.3.4. Quais são as diferenças existem ao acessar um produtor diretamente ou por outros canais?

2. Ciclo de Compras:

2.1. Com quantos meses de antecedência um PRODUTOR EM GERAL compra os insumos?

Por favor, descreva brevemente o ciclo de compras (processo de decisão de compra).

2.1.1. O processo ou tempo muda se for um PRODUTOR VENDA DIRETA?

3. Responsável pela Decisão:

3.1. Quem toma a decisão de compra de insumos para um PRODUTOR EM GERAL?

3.1.1. Como isso muda quando analisamos um PRODUTOR VENDA DIRETA DA EMPRESA?

3.2. Quem são os agentes que influenciam a compra de insumos de um PRODUTOR EM GERAL?

3.2.1. Como isso muda quando analisamos um PRODUTOR VENDA DIRETA DA EMPRESA?

4. Relacionamento com Clientes:

4.1. Como o relacionamento com PRODUTORES EM GERAL é feito?

4.1.1. E no caso de PRODUTORES VENDA DIRETA, como é feito?

4.2. Você tem um programa de relacionamento com PRODUTORES EM GERAL?

4.2.1. E com PRODUTORES VENDA DIRETA?

4.2.2. Se sim, como esse(s) programa(s) funciona(m)? (ressaltar a confidencialidade)

5. Drivers de Relacionamento:

5.1. Você acredita que os produtores se relacionam emocionalmente com as marcas das empresas de defensivos?

5.2. Na sua visão, o que gera lealdade com os PRODUTORES EM GERAL?

5.2.1. Isso muda para PRODUTORES VENDA DIRETA?

6. Custo de Troca de um Fornecedor:

6.1. Quais os motivos que um PRODUTOR EM GERAL troca de marca ou produto que está utilizando?

6.1.1. Você acredita que a troca de marca ou produto ocorre em uma frequência diferente com PRODUTORES VENDA DIRETA? Por quê?

7. Valor Percebido pelo Cliente:

7.1. Para os PRODUTORES EM GERAL, quais são os fatores que o produtor mais valoriza?

7.6. E para PRODUTORES VENDA DIRETA, o que é mais valorizado?

8. Comunicação e Proposições para Clientes:

8.1. Quais são os tipos de ações de comunicação feitas com os PRODUTORES EM GERAL?

8.1.1. E as ações de comunicação para PRODUTORES VENDA DIRETA?

8.1.2. Qual o objetivo dessas ações de comunicação?

8.2. Nas ações de comunicação, o que é destacado nas mensagens (ex. fatores emocionais, técnicos)?

9. Serviços Oferecidos para os Clientes:

9.1. Quais são os serviços oferecidos para os PRODUTORES EM GERAL?

9.1.1. Quais são os serviços oferecidos para os PRODUTORES DE VENDA DIRETA?

10. Problemas e Necessidades dos Produtores:

10.1. Quais são as necessidades e dores mais comuns dos PRODUTORES EM GERAL?

10.1.1. Quais são as necessidades e dores mais comuns dos PRODUTORES DE VENDA DIRETA?

11. B2F

11.1. Como você vê estes mercados? Na sua opinião, o que acontecerá com o futuro da venda direta, revendas e cooperativas, o que espera para cada um destes 3 elos daqui 5 anos?

11.2. Descreva o que faz ser uma empresa bem-sucedida nesse mercado de insumos.

11.3. Você já ouviu falar do termo B2F (Business-to-Farmer)?

11.3.1. Se sim, o que você entende por ele?

11.4. Pense na forma de fazer negócios de uma empresa com empresa (B2B), você vê diferenças na relação empresas com o produtor se comparado com a relação empresas com empresas?

APPENDIX C – QUESTIONNAIRE FOR EXPERTS (IN PORTUGUESE)

ROTEIRO DE ENTREVISTA – ESPECIALISTA

ENTREVISTA N°:

DATA:

LOCAL:

PERMISSÃO PARA GRAVAR:

OBJETIVO: Identificar, na perspectiva da indústria e especialistas de mercado, a visão sobre a existência do B2F (Business to Farmer), identificar quais são as características dele e quais as práticas empregadas pela indústria de insumos agrícolas tendo em vista o B2F.

PERFIL DO ENTREVISTADO

Informação Sobre o Entrevistado:

- Nome:
- Ocupação:
- Experiência na ocupação:

Informações Sobre a Empresa (obtidas previamente pelo entrevistador):

- Nome da empresa:
- Informações básicas:
 - Área de atividade:
 - Mercado alvo:
 - Produtos e serviços:

QUESTIONÁRIO

Definição de termos:

- PRODUTORES VENDA DIRETA = Produtores grandes que compram diretamente da indústria
- PRODUTORES EM GERAL = Produtores médios e pequenos que compram de canais de distribuição (ex. revendas e cooperativas)

1. Canais de Distribuição:

- 1.1. Quais são os canais uma empresa vende insumos agrícolas?
 - 1.1.1. Qual é a participação dos canais nas vendas?
- 1.2. Quais são os pontos de contato que a empresa tem com os produtores (venda de produtos, programa de relacionamento, serviços, etc.)? Como esses contatos ocorrem durante a safra?
- 1.3. Como a venda ocorre para PRODUTORES VENDA DIRETA?
 - 1.3.1. Se sim, quais os motivos para vender diretamente não passando pelos canais?
 - 1.3.2. Quais características um produtor precisa ter para ser acessado diretamente pela empresa?
 - 1.3.3. Como ela faz esse acesso?
 - 1.3.4. Quais são as diferenças existem ao acessar um produtor diretamente ou por outros canais?

2. Ciclo de Compras:

- 2.1. Com quantos meses de antecedência um PRODUTOR EM GERAL compra os insumos?
Por favor, descreva brevemente o ciclo de compras (processo de decisão de compra).
 - 2.1.1. O processo ou tempo muda se for um PRODUTOR VENDA DIRETA?

3. Responsável pela Decisão:

- 3.1. Quem toma a decisão de compra de insumos para um PRODUTOR EM GERAL?
 - 3.1.1. Como isso muda quando analisamos um PRODUTOR VENDA DIRETA DA EMPRESA?
- 3.2. Quem são os agentes que influenciam a compra de insumos de um PRODUTOR EM GERAL?
 - 3.2.1. Como isso muda quando analisamos um PRODUTOR VENDA DIRETA DA EMPRESA?

4. Relacionamento com Clientes:

- 4.1. Como o relacionamento com PRODUTORES EM GERAL é feito?
 - 4.1.1. E no caso de PRODUTORES VENDA DIRETA, como é feito?
- 4.2. Como funciona os programas de relacionamento com PRODUTORES EM GERAL?
 - 4.2.1. E com PRODUTORES VENDA DIRETA?

5. Drivers de Relacionamento:

- 5.1. Você acredita que os produtores se relacionam emocionalmente com as marcas das empresas de defensivos?

5.2. Na sua visão, o que gera lealdade com os PRODUTORES EM GERAL?

5.2.1. Isso muda para PRODUTORES VENDA DIRETA?

6. Custo de Troca de um Fornecedor:

6.1. Quais os motivos que um PRODUTOR EM GERAL troca de marca ou produto que está utilizando?

6.1.1. Você acredita que a troca de marca ou produto ocorre em uma frequência diferente com PRODUTORES VENDA DIRETA? Por quê?

7. Valor Percebido pelo Cliente:

7.1. Para os PRODUTORES EM GERAL, quais são os fatores que o produtor mais valoriza?

7.6. E para PRODUTORES VENDA DIRETA, o que é mais valorizado?

8. Comunicação e Proposições para Clientes:

8.1. Quais são os tipos de ações de comunicação feitas com os PRODUTORES EM GERAL?

8.1.1. E as ações de comunicação para PRODUTORES VENDA DIRETA?

8.1.2. Qual o objetivo dessas ações de comunicação?

8.2. Nas ações de comunicação, o que é destacado nas mensagens (ex. fatores emocionais, técnicos)?

9. Serviços Oferecidos para os Clientes:

9.1. Quais são os serviços oferecidos para os PRODUTORES EM GERAL?

9.1.1. Quais são os serviços oferecidos para os PRODUTORES DE VENDA DIRETA?

10. Problemas e Necessidades dos Produtores:

10.1. Quais são as necessidades e dores mais comuns dos PRODUTORES EM GERAL?

10.1.1. Quais são as necessidades e dores mais comuns dos PRODUTORES DE VENDA DIRETA?

11. B2F

11.1. Como você vê estes mercados? Na sua opinião, o que acontecerá com o futuro da venda direta, revendas e cooperativas, o que espera para cada um destes 3 elos daqui 5 anos?

11.2. Descreva o que faz ser uma empresa bem-sucedida nesse mercado de insumos.

11.3. Você já ouviu falar do termo B2F (Business-to-Farmer)?

11.3.1. Se sim, o que você entende por ele?

11.4. Pense na forma de fazer negócios de uma empresa com empresa (B2B), você vê diferenças na relação empresas com o produtor se comparado com a relação empresas com empresas?