

FOODLINK

U.S.

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U.S. SEAFOOD ROUNDUP:



SUSTAINABILITY, AQUACULTURE, AND HEALTHY TREND FEED ROBUST INDUSTRY

The U.S. fishing industry is strong, vibrant, and a valued part of the nation's history, as well as economy. The rich harvests stem from well managed programs and oceans of environmentally conscious individuals, including fishermen, scientists, and environmentalists who are continually joining efforts to preserve nature's delicate balance and spawn future growth.

U.S. commercial fishermen hauled in 9.9 billion pounds of seafood in 2013, valued at \$5.5 billion, according to the National Oceanic and Administration Fisheries (NOAA). These figures exhibit a small increase in pounds (2.5%) and a large increase in value (7.6%) over the prior year. Poundage and value continue to remain higher than the average of the preceding decade (9.2 billion pounds valued at \$4.1 billion).

Alaska continued to lead all states in both volume and value of landings. Massachusetts was No. 2 in value (\$566.9 million) and Maine was No. 3 (\$473.9 million), according to NOAA's annual report.

TOP COMMERCIAL FISHING PORTS

For the 14th consecutive year, New Bedford, Massachusetts, had the highest valued catch (\$379 million) due largely to the highly valued sea scallop fishery. Sea scallops account for 81% of the value of landings in New Bedford. For the 17th consecutive year, Dutch Harbor, Alaska, led the nation as the port with the highest volume of seafood landed (753 million pounds valued at \$197 million). Alaska pollock made up 88% of the volume and 46% of the value. Snow crabs and king crabs accounted for an additional 32% of the value of Dutch Harbor landings and 3.2% of the volume.

Americans consumed 4.6 billion pounds of seafood in 2013. The U.S. is the world's third largest consumer of seafood after China and Japan, according to data from the Food and Agriculture Organization of the United Nations. The average American ate 14.5 pounds of fish and shellfish in 2013, basically unchanged from the prior year.

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U.S. SEAFOOD ROUNDUP *Continued*

CONSUMER PREFERENCES

U.S. consumers clearly have an unwavering appetite for shrimp. These versatile crustaceans continue to be the most widely consumed seafood, according to the National Fisheries Institute's (NFI) annual list. Salmon, which swapped places with canned tuna, is the second most popular seafood. The NFI noted the rise in salmon consumption is due partially to the record-high catch of Alaska pink salmon, much of which is processed as canned or frozen fish. Tilapia and pollock retained their ranks and rounded out the top five. Shifts in rank among the remaining top 10 include: cod moved up one notch to seventh place, catfish also climbed one rung to No. 8, and crab slipped down two places to No. 10.

With overfishing an ongoing concern, the industry continues to encourage consumers to expand their palates and try underutilized species. An increasing number of chefs are joining this sustainability effort as they prepare some unfamiliar species and tout how nutritious and delicious they are. Some entrees, featuring catches from the Northeast region of the U.S., include: skate with capers and brown butter, dogfish salad, coriander-crusted skate, and grilled porgy with smoked tomato chutney.



Restaurant menus are expected to feature more seafood selections this year, as part of the growing healthy-eating trend. There is rising awareness that seafood is a lean source of high-quality protein, an important source of Omega-3 fatty acids, and rich in vitamins and minerals. Sustainable seafood, locally sourced seafood, and non-traditional fish are cited among the National Restaurant Association's "What's Hot In 2015" trends.

AQUACULTURE AT A GLANCE

Aquaculture (fish or shellfish farming) is a sustainable and growing industry in the U.S. Total U.S. marine and freshwater



aquaculture production is valued at \$1.2 billion, and has been increasing steadily, according to NOAA. The top U.S. marine species are Atlantic salmon (\$7.7 million), oysters (\$1.3 million), and clams (\$9.9 million).

There is aquaculture in some form in all 50 states. The largest production states for marine aquaculture are Maine, Washington, Virginia, Louisiana, and Hawaii, while the largest states for freshwater aquaculture are Mississippi (catfish) and Idaho (trout).

A glimpse of Maine, known for its cold, pristine coastal water, finds approximately 1,300 acres of marine waters leased in the state for aquaculture. Maine farms a broad variety of seafood—Atlantic salmon, oysters, mussels, cod, halibut, soft shell clams, and trout among other species. Ninety companies in Maine now operate 180 aquaculture farms, according to the Maine Aquaculture Association (MAA).

Maine has been the top aquaculture state since 2011 in terms of sales, according to Sebastian Belle, executive director of MAA. Its farmers sell \$50 to \$100 million in aquaculture products annually. Salmon is by far the top farmed species in Maine, followed by oysters and mussels, outlined the *Press Herald*.

Aquaculture is an extremely resource-efficient means to produce protein. Generally, fish convert more of the food they eat into body mass than land animals. For example, it takes 1.2 pounds of feed to produce 1 pound of salmon. Meanwhile, it takes 8.7 pounds of feed to produce 1 pound of beef, 5.9 pounds of feed to produce 1 pound of pork, and 1.9 pounds of feed to produce 1 pound of chicken.

SEAFOOD BUZZ

It was another year of historic landings and improved value for Maine lobster. Maine lobster fishermen caught over 120 million pounds during the 2014 season with a record overall value of \$456 million, according to the Maine

Department of Marine Resources.

China's appetite for American lobster is skyrocketing. American exports of live or processed lobster to China climbed to \$90.5 million in 2014 from \$2.1 million in 2009. China took approximately 12% of U.S. lobster exports in 2014, up from 0.6% in 2009. Chinese New Year is on the verge of becoming Maine's second-biggest lobster shipping week of the year, behind Christmas week, according to industry officials, reported *Bradenton Herald*.

Lobster Exports—Exports overall increased 20% in volume and 35% in dollar value in a year-to-date comparison ending Dec. 31, 2014. Approximately 9.3 million pounds were imported compared with 6.6 million pounds in 2013. The total coast was about \$59.5 million, up from \$44.0 million in 2013.

Scallops—Prices for Maine scallops are at a record high, ranging from \$12.50 to \$14 per pound. Fishermen are benefiting from a new management system that made scallops more plentiful, with 425,000 pounds of meat landed in 2013, up from a low of 33,000 pounds eight years earlier, reported *Press Herald*.



Urban Organics, a Minnesota-based aquaponics firm, will expand its fish and vegetable farming with its purchase of a former Schmidt Brewery site in St. Paul, Minnesota. Through aquaponics, Urban Organics raises fish and vegetables symbiotically. Aquaponics, a more economical way to farm, uses less than 2% of water used for conventional farming, reported Minneapolis *Star Tribune*.

Global production of seafood must double by 2050 to meet the rising demand, according to the World Resource Institute. Aquaculture already supplies approximately half of the world's seafood.

RETAIL TRENDS:

SUPERMARKETS, MORE THAN A DESTINATION FOR GROCERIES

Dining out at supermarkets continues to rise in popularity, and an increasing number of consumers are making these retail outlets their destination of choice when deciding to eat out. More than half of consumers have eaten in a grocery store dining area in the past year, according to Acosta Sales & Marketing's *The Why Behind the Dine*.

While convenience might be a large factor for consumers who combine their grocery shopping trip with eating out at the supermarket, this is not necessarily the case when they make a trip there simply to eat out. Consumers are being attracted to new upscale sites and offerings. Supermarket retailers, competing more aggressively with local restaurants for eating out sales, are enhancing eateries, customizing menus, and providing consumers with a welcoming environment to dine.

Sales of prepared foods at the Whole Foods Market chain hit \$2.7 billion in 2014, and comparable to Chipotle Mexican Grill's \$3.2 billion in sales. Five years ago, Whole Foods had no full-service restaurants and fewer than a dozen venues where customers could sit, eat, and have a beer or glass of wine, reported *The Wall Street Journal*. Presently, it has more than 100 stores with such venues, and about half of them offer waiter service.



Whole Foods focuses on the specific needs of the community wherever it opens. The natural and organic grocer tailors its eating facilities accordingly. For example, Whole Foods will open a 40,000-sq. ft. store in Dublin, California, May 20, featuring dining and entertainment. The store, possessing a "modern farmhouse" look, will include a pizza venue, tap room, wine tasting area, and an outdoor patio with space for live music and performances.

"Dublin is home to lots of families, people who love the outdoors, and folks who enjoy a strong sense of community," said company team leader Allen Culp. "That's why we're building this store as much as a social spot as a place to buy groceries. We want to give local musicians a place to play, foodies a wide selection of trending ingredients to share with friends, and parents a comfortable, welcoming place to have a quick and easy meal with their kids," explained Mr. Culp.



A new Whole Foods Market in Little Rock, Arkansas, boasts a hot barbecue bar featuring meats smoked in the store, a coffee and fresh juice bar, and a beer and wine bar serving pub style food. The 34,000-sq. ft. store also has a signature sandwich menu created just for Little Rock, with build-your-own sandwich options. There is indoor and outdoor community seating at the front of the store.

A recently opened 29,600-sq. ft. Whole Foods Market in the Chicago, Illinois-area near DePaul University touts a Cuban-inspired taqueria featuring pollo asado, ropa vieja (shredded beef dish), mojo pork and jackfruit tacos. There's house-made Neapolitan style pizza, a build-your-own sandwich bar, a side-street coffee window with an assortment of coffee and espresso drinks and smoothies, and The Red Star Bar, offering eight brews on tap.

Another supermarket retailer, Mariano's, a Chicago-based unit of Roundy's Inc., is opening new outlets with sushi counters and oyster bars. Cincinnati-based Kroger, meanwhile, is testing grilling stations between its meat and seafood counters, reported *The Wall Street Journal*.

MORE RETAILERS INVESTING IN DIETITIANS

Look for dietitians in grocery aisles, giving a store tour, conducting classes, or scheduling consultations for specific needs. As health continues to be a major concern for consumers, dietitians are appearing in greater numbers across the retail spectrum. The recent growth in the number of food stores and chains having dietitians on staff is reflected in the Retail Dietitians Business Alliance's 2014 retail report, which found that 17% of respondents have been in the retail field for less than one year, 51% of respondents have worked in it for one to five years, while 27% have been in the field for six to 10 years, and just 6% have been involved for more than 10 years. Fifty-eight percent of them worked in-store, while 8% worked at the regional level and 34% were corporate.

Most respondents worked in a city with 100,000 or more residents, at 58%. The most common U.S. region was the Northeast U.S., where 47% of respondents worked, followed closely by the Midwest at 46%. In contrast, only 5% of respondents were working in the Northwest, and 1% each in the South and Southwest.

Approximately 37% of those surveyed charged shoppers for individual consultations and long-term programs. Nominal fees of \$20 or less were occasionally charged for classes.

While a number of retailers have embarked on the in-store dietitian phenomenon earlier, many are boosting their programs from one or two and hiring a team of dietitians so they can be available chainwide. Some are available to shop right alongside consumers, if needed to assist with healthy choices or specific dietary needs. This movement will continue to gain momentum as retailers continue to look for ways to differentiate themselves from the competition.



Calendar of Events

APRIL

21-23: Food & Hotel Vietnam*
Ho Chi Minh City, Vietnam
Saigon Exhibition and Convention Center
<http://foodnhotelvietnam.com/>

21-23: Seafood Expo Global*
Brussels, Belgium
BRUSSELS EXPO
<http://www.seafoodexpo.com/global/>

28-30: SIAL Canada*
Toronto, Canada
Direct Energy Centre
<http://www.sialcanada.com/>

MAY

5-7: Vitafoods Europe*
Geneva, Switzerland
Palexpo
<http://www.vitafoods.eu.com/>

6-8: SIAL China*
Shanghai, China
Shanghai New International Expo Centre
<http://www.sialchina.com>

12-15: Seoul Food & Hotel*
Seoul, Korea
Korean International Exhibition Center
<http://www.seoulfoodnhotel.co.kr/>

JUNE

9-11: SIAL Brazil
Sao Paulo, Brazil
Expo Center Norte
<http://www.sialbrazil.com>

**Food Export Association of the Midwest USA and Food Export USA-Northeast will be at this show.*



DISCOVER FISH AND SHELLFISH PRODUCTS FROM THE NORTHEAST USA

A long history of responsible fishing and good, science-based, conservation management practices have produced sustainable and profitable fish and shellfish resources. The seafood suppliers of the northeastern United States have a strong reputation for providing quality fish and shellfish products at competitive pricing to buyers worldwide, including:

 <p>AMERICAN LOBSTER <i>Homarus americanus</i></p> <p>HARVESTING METHOD Traps</p> <p>PRODUCT FORMS Live, raw meat, fresh cooked meat, and frozen</p> <p>DISTRIBUTION CHANNELS Restaurants and retail</p> <p>AVAILABILITY Year-round</p>	 <p>U.S. ATLANTIC SEA SCALLOPS <i>Placopecten magellanicus</i></p> <p>HARVESTING METHOD Dredges and trawl nets</p> <p>PRODUCT FORMS Fresh and frozen meats</p> <p>DISTRIBUTION CHANNELS Restaurants, retail, and processing</p> <p>AVAILABILITY Year-round</p>			
 <p>MONKFISH <i>Lophius americanus</i></p> <p>HARVESTING METHOD Trawl nets and gillnets</p> <p>PRODUCT FORMS Whole fish, tails, fillets, livers and stomachs, fresh and frozen</p> <p>DISTRIBUTION CHANNELS Restaurants and retail</p> <p>AVAILABILITY Year-round</p>	 <p>ATLANTIC HERRING <i>Clupea harengus</i></p> <p>HARVESTING METHOD Mid-water trawl nets</p> <p>PRODUCT FORMS Land-frozen and sea-frozen</p> <p>DISTRIBUTION CHANNELS Retail and processing</p> <p>AVAILABILITY Year-round</p>	 <p>ATLANTIC MACKEREL <i>Scomber scombrus</i></p> <p>HARVESTING METHOD Mid-water trawl nets</p> <p>PRODUCT FORMS Land-frozen and sea-frozen</p> <p>DISTRIBUTION CHANNELS Retail and processing</p> <p>AVAILABILITY November/December through April/May</p>		
 <p>DOGFISH <i>Squalus acanthias</i></p> <p>HARVESTING METHOD Bottom gillnets, trawl nets, and hook gear</p> <p>PRODUCT FORMS Fresh and frozen—backs, belly flaps, and fins</p> <p>DISTRIBUTION CHANNELS Restaurants and retail</p> <p>AVAILABILITY Year-round</p>	 <p>SKATE <i>Raja spp.</i></p> <p>HARVESTING METHOD Gillnets and trawl nets</p> <p>PRODUCT FORMS Fresh and frozen—wings and fillets</p> <p>DISTRIBUTION CHANNELS Restaurants and retail</p> <p>AVAILABILITY Year-round</p>	 <table border="0"> <tr> <td data-bbox="1113 1747 1270 1848"> <p>LONG-FINNED BOSTON/WINTER SQUID <i>Loligo pealei</i></p> </td> <td data-bbox="1317 1769 1466 1848"> <p>SHORT-FINNED SUMMER SQUID <i>Illex illecebrosus</i></p> </td> </tr> </table> <p>HARVESTING METHOD Otter trawl nets, pound nets, and fish traps</p> <p>PRODUCT FORMS Sea-frozen squid (whole) and land frozen squid (whole, cleaned tubes and tentacles), size-graded by tube length</p> <p>DISTRIBUTION CHANNELS Restaurants, retail, and processing</p> <p>AVAILABILITY Year-round</p>	<p>LONG-FINNED BOSTON/WINTER SQUID <i>Loligo pealei</i></p>	<p>SHORT-FINNED SUMMER SQUID <i>Illex illecebrosus</i></p>
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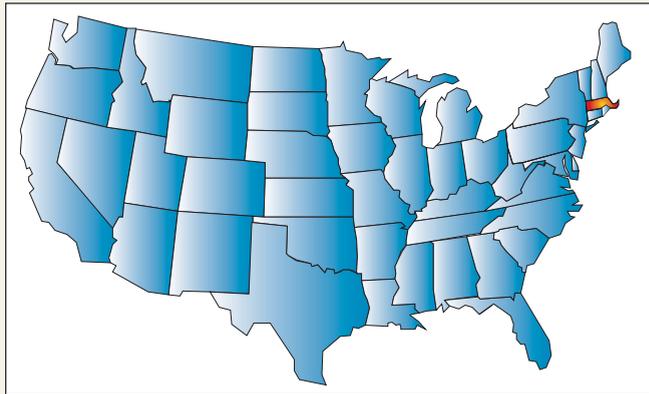
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STATE SPOTLIGHT: Massachusetts

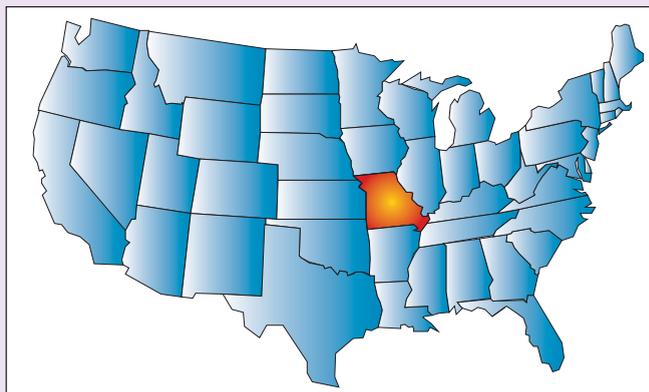


- ✓ Massachusetts has over 7,700 farms working approximately 523 thousand acres, or just over 10% of the total land.
- ✓ The state is home to more than 300 specialty food producers, who produce everything from jams, jellies, breads, candies, cheeses, ice cream, coffee, tea, cranberry confections, and wines to salsas, granolas, salmon, and shiitake mushrooms.
- ✓ In 2013 Massachusetts exported \$464.2 million in processed food products with the top markets including Canada, China, Netherlands, Saudi Arabia, and Mexico.
- ✓ In 2013 Massachusetts exported \$481 million in fish and seafood products which ranked it third in the nation. Top destinations included Canada, France, Spain, Italy, and the United Kingdom.
- ✓ Massachusetts is 2nd in the U.S. for cranberry and wild blueberry production, and also ranks in the top 10 nationally in the production of squash, maple syrup, and raspberries.
- ✓ Massachusetts' most valuable crops include greenhouse and nursery commodities, making up over one third of the state's total agricultural production, followed by cranberries, sweet corn, and apples.
- ✓ The most valuable livestock products of the "Bay State" are dairy products. Cattle and calves, and aquaculture also make up a large part of the Massachusetts agriculture industry.

2013 TOP AGRICULTURAL EXPORTS:

LOBSTER, LIVE FRESH & CHILLED	
Total Value:	\$179.6 million
SCALLOPS, FROZEN, DRIED, SALTED, IN BRINE	
Total Value:	\$95.1 million
ICE CREAM & EDIBLE ICE	
Total Value:	\$65.8 million
CRANBERRIES, PREPARED & PRESERVED	
Total Value:	\$51 million
CRANBERRY JUICE	
Total Value:	\$46.2 million
SCALLOPS, LIVE FRESH & CHILLED	
Total Value:	\$32.1 million
MISCELLANEOUS FOOD PREPARATIONS	
Total Value:	\$25.9 million
LOBSTER, INCLUDING IN SHELL, FROZEN	
Total Value:	\$25.8 million
BAKERY PRODUCTS & SNACK FOODS	
Total Value:	\$24.3 million
DOG & CAT FOOD	
Total Value:	\$18.6 million

STATE SPOTLIGHT: Missouri



- ✓ Missouri farms number over 99,000 which occupy more than 28 million acres, nearly two-thirds of the state's total land.
- ✓ The state also has a significant forestry industry, and products include hardwood flooring, hardwood lumber (Black Walnut, White Oak, and Red Oak), and cooperage.
- ✓ Kansas City is now the hub of the "NAFTA Trade Corridor," given its strategic location and now has both Canadian and Mexican Customs operating within it.
- ✓ In 2013 Missouri exported over \$1.5 billion in processed food products, the top markets including Mexico, Canada, Japan, Indonesia, China, and South Korea.
- ✓ The most valuable agricultural commodities produced by Missouri are cattle and calves. Other valuable livestock products include hogs, dairy products and turkeys.
- ✓ Soybeans are Missouri's most valuable crop, followed by grain corn. Other valuable crops include cotton, wheat, and hay.
- ✓ The wine industry in Missouri has more than 100 wineries selling nearly half a million cases of many distinctive wines, including rare varieties like Cynthiana/Norton, Vignoles, Seyval, and Chambourcin.

2013 TOP AGRICULTURAL EXPORTS:

SOYBEAN FLOUR & MEAL	
Total Value:	\$189 million
PORK MEAT, FROZEN	
Total Value:	\$183.9 million
MISCELLANEOUS FOOD PREPARATIONS	
Total Value:	\$179.5 million
PORK MEAT, FRESH & CHILLED	
Total Value:	\$139.8 million
SOYBEANS FOR OILSTOCK OR CONSUMPTION	
Total Value:	\$138.8 million
CORN, OTHER THAN SEED CORN	
Total Value:	\$110.2 million
CORN GLUTEN FEED & MEAL	
Total Value:	\$101.6 million
DOG & CAT FOOD, PUT UP FOR RETAIL SALE	
Total Value:	\$82 million
ANIMAL FEED PREPARATIONS	
Total Value:	\$81.5 million
BEER MADE FROM MALT	
Total Value:	\$76.4 million
SOYBEAN OILCAKE & SOLIDS	
Total Value:	\$68.9 million
PORK OFFAL, FROZEN	
Total Value:	\$43 million

NEWS BRIEFS

Consumers' new priority is transparency. Nearly 40% of U.S. consumers look for products that are all natural, while 35% seek out products that carry a local claim, according to research specialist Mintel. Food and drink trends in American households in 2015 will include healthy lifestyles, "clean" ingredients, at-home gourmards, value consciousness, and e-commerce specialty products. Value will also continue to drive consumer choice this year, as the influence of private label products will be more noticeable. Between January and November 2014, 30% of U.S. food and drink launches were private label. It is important to note that while U.S. consumers are continually redefining their definition of value, there is certainty that value is not always just about the lowest price. Products that are not cheap, but offer good value, also appeal to consumers, noted Mintel.

Ready-to-drink cold coffee consumption is on the rise. While fresh-brewed iced coffee is the most popular cold coffee choice, a growing share of all iced/cold coffee drinkers are

drinking ready-to-drink (RTD) canned or bottled cold coffee. Frequent consumption of RDT canned/bottled cold coffee drinks (including espresso and cappuccino) has increased during the past two years, particularly among Millennials and Hispanics, according to Multi-sponsor Surveys, Inc.'s recent U.S. Coffee study. Seventy-five percent of coffee drinkers now drink both hot and cold coffee beverages, revealed the study, outlined *Prepared Foods*. Nearly 70% of cold coffee drinkers have tried RTD canned/bottled coffee.

When are consumers reaching for name-brands, private brands? Over half of Americans prefer name-brands when purchasing breakfast cereal, carbonated soft drinks, bagged snacks, prepared frozen foods, coffee and yogurt, according to The Harris Poll. Private brands are most popular for milk, frozen vegetables, cooking oil, canned vegetables, dry pasta, and bottled water. Both Baby Boomers and Matures are more likely than Millennials to turn to name-brands for coffee, while Gen Xers, Baby Boomers, and Matures are all more likely

than Millennials to reach for name-brand dry pasta and frozen vegetables.

Private label sales continue to reach new heights. U.S. consumers spent \$120 billion on private-label products in 2014, marking a 2.1% year-over-year increase, according to IRI Times & Trends' report, *Private Label and National Brands: Dialing In on Core Shoppers*. Private label is strong in the mass/super channel, while national brands showed the most momentum in drug stores.

Food shopping patterns in the U.S. are changing dramatically. Shoppers use an average of three food channels per week, including grocery, specialty, mass merchandise, club, and online, revealed a study by The Hartman Group and MSLGROUP. Approximately 52% of shopping trips involve two or more stores. Unlike past years, men are making just as many monthly store visits as women, and now account for 43% of primary food shoppers. The study also found that men have a preference for club, convenience, and online channels due to the ease

of locating what they need. Convenience is a priority and they are less price sensitive than women.

With more consumers using smartphones and tablets to shop, mobile is a top priority for retailers this year. Close to 60% of surveyed retailers placed it at the top of their list, up from 53% a year ago, according to the 2015 Shop.org/Forrester Research Inc. *State of Retailing Online*. Smartphone sales as a percentage of online sales grew from 8% in 2013 to 12% in 2014, and tablets' share grew from 13% of online sales in 2013 to 16% in 2014.

Top specialty food purchases: Chocolate was the most common specialty food purchased by consumers, according to *Today's Specialty Food Consumer 2014*, a report by the Specialty Food Association and Mintel. Olive oil/other specialty oils, cheese, coffee, and salty snacks rounded out the top five categories purchased. Sixty-six percent of specialty food consumers shopped at supermarkets, followed by 36% shopping at natural food stores and 35% at mass merchandisers.

MISSION STATEMENT

The U.S. Foodlink newsletter and e-mail bulletin are brought to you by the Food Export Association of the Midwest USA and Food Export USA-Northeast, two state regional trade groups located in the U.S. that promote exports of U.S. food and agriculture. Food Export-Midwest and Food Export-Northeast administer many services through Market Access Program (MAP) funding from the Foreign Agricultural Service (FAS) of the USDA. U.S. Foodlink was created to provide readers credible data and information in an easy-to-read format.

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