

FOODLINK

U.S.

THE BI-MONTHLY NEWSLETTER FOR IMPORTERS OF U.S. FOODS

JUNE/JULY 2015

VOL. 11 No. 3



SNACKING, THE NEW NORM, ACCELERATES AND EMBRACES ALL GENERATIONS

Snacking is rising to new heights and creating dramatic changes in consumption patterns among U.S. consumers. Gone are the days when a snack was occasionally consumed in between meals to curb one’s hunger until the next mealtime. Snacking has evolved into an ongoing eating experience throughout the entire day. These random mini-munching occasions, driven by changing lifestyles and demographics, are distancing consumers further from the traditional eating pattern of three full meals a day.

An overwhelming majority of Americans (91%) say they snack daily, according to Nielsen research. One quarter say they snack three to five times a day, 3% are always nibbling, 8% always binge snack and another 31% do so occasionally. Nearly 20% of survey respondents say they snack more than one year ago. Women snack more frequently, with one in four snacking three to four times a day, with less than one in five men doing the same.

We were not always a nation of snackers. In the 1980s, the majority of consumers (70%) said they tried to avoid snacking entirely, noted Darren Seifer, a food and beverage industry analyst at NPD Group.

Snacks represent 50% of eating occasions in the U.S., according to The Hartman Group. Most of these eating occasions (80%) take place at home. Also, almost half (47%) of eating occasions are now alone, and this trend is on the upswing. Eating alone is no longer about being lonely, but enjoyed as an opportunity to multitask and catch up on activities. Even in multi-person households, some 40% of eating occasions happen alone.

There are no rules when it comes to deciding what constitutes a snack. Today, almost any food or beverage can be considered a snack—hummus, yogurt, fruit, meat jerky, protein shakes, roasted seaweed sheets, cereal, chips, nuts, seeds and the list goes on.

Consumers are seeking “interesting, less processed food in smaller packages that can be eaten on the go,” says Hartman. Eating “on the go” can also occur while sitting at home. This includes food purchased at a restaurant or retailer, then brought home to eat, sometimes in combination with other items in the refrigerator.

Food manufacturers, retailers and food service operators are aggressively responding to the snacking phenomenon. There’s a constant stream of innovative products hitting the market that are especially designed for eating on the go. Also, many existing products are being repackaged in convenient snack-size portions and microwaveable bowls. While it is common to see products

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SNACKING *Continued*

such as oatmeal and macaroni and cheese packaged in microwaveable bowls, products that were never thought of as snacks, including olives in single-serve cups, are making their debut.

Although the present trend is focused on healthy eating, many consumers are still reaching for indulgent options that don't fit the health and wellness model of eating. Many times, they are simply satisfying a whim or craving.

Consumer research giant Nielsen says Americans—who buy more than \$120 billion in snacks each year—snack differently than other nations. For example, they have a strong affinity for chips, nuts and other salty snacks, according to Nielsen's Global Survey of Snacking. Nearly a quarter of the money spent on snacks in North America is for salty snacks. Refrigerated items such as yogurt, comprise approximately 18% of snacks sold; vegetables and fruit, roughly 14%; and cookies and cake, less than 10%, outlined *The Washington Post*.

TOP SNACK CHOICES

Here's a look at the snacks Americans had consumed during a recent 30-day period. Nielsen found that slightly more than half of U.S. respondents (63%) reached for chips (potato chips, tortilla chips, crisps etc.)—the highest percentage for any snack food. Interestingly, salty snacks took the lead while many Americans said they are trying to limit their salt intake. Chocolate was the second most popular choice with 59% reporting that they had eaten the sweet treat during that period; 58% had eaten cheese; 56% had eaten cookies and biscuits; 55% fresh fruit; 48% bread and sandwiches (eaten outside of a meal); 48% crackers; 44% vegetables; 44% peanut butter and 43% had snacked on popcorn.

A snapshot outside the U.S. shows Europeans bypassing the chips in favor of fresh fruit, chocolate, cheese and yogurt, according to Nielsen's survey. In Latin America, yogurt was the most popular snack during the 30-day period. In Asia, chocolate was the snack of choice. In the Middle East and Africa, fresh fruit edged out chocolate but ever so slightly.

Snacks are taking the place of breakfast, lunch and dinner for many Americans. Nielsen found that the mid-day meal was the one most likely to be replaced with a snack as 52% of respondents said they ate snacks instead of lunch; 41% ate snacks in

place of dinner, and 49% traded breakfast for a snack.

FUTURE OUTLOOK

The NPD Group projects that snack foods eaten at (or as) the main meal will grow by approximately 5% over the next five years to \$86.4 billion by 2018.

WHAT'S HOT?

The snack market is bustling with activity! A multitude of novel products and emerging snack trends are painting a new eating landscape. The products that are creating a buzz are those that generally possess some of the following attributes: portable, convenient, handheld, healthy, recognizable ingredients, natural, organic, gluten-free, vitamin-enriched, high-protein and fiber.



Wildly popular snack bars certainly meet consumer demands. There appears to be one for everybody! This category, diversified well beyond energy bars, includes fiber bars, protein-packed bars, gluten-free bars, bars for women and men, indulgent bars, granola bars, yogurt bars and seed-based bars among others. Protein, a major focus industrywide, is the predominant trend in today's bar segment, according to *Snack Food & Wholesale Bakery*.

A glimpse at new bar launches: Perfect Bar & Company, California, unveiled its refrigerated Perfect Bar with more than 20 organic superfoods without a chemical preservative, artificial ingredient or refined sugar, according to *Prepared Foods'* 2015 New Products Annual. With "small" being a big trend, The Balance Bar Company, New York, introduced Balance bites, protein-packed, snack bites with a crunch. Each single-serve pouch features 13 grams of protein, is gluten-free and non-GMO. Procter & Gamble Co., Ohio, rolled out Meta Health Bars, a high-fiber product.

Potato chips, a long-time favorite, continue to expand with novel flavor profiles. Heat spiced up the category (Kettle Foods' Kettle Brand Sriracha Potato Chips) and taste buds were entertained with varieties such as Turkey & Gravy, Cranberry and Pumpkin Pie. Protein chipped its way into the category with ProTings Protein Chips, and Quest Protein Chips, noted *Prepared Foods*.

Veggie snacks are sprouting vigorously. General Mills is marketing *Green Giant* Cheddar Baked Veggie Puffs "made with real vegetables." Kale is greening up snacks in products such as SuperEats Kale +Chia chips, a tortilla-like chip with 70% of the daily value of vitamin A and 80% of vitamin C. Rhythm Superfoods is out with Broccoli Bites made from dehydrated fresh broccoli.

The focus on health and wellness was highlighted at Natural Products Expo West 2015. Rabobank analysts spotted noteworthy trends: Ancient grains were plentiful, with sprouted grains and chia generating much interest. Snack bars appeared limitless—Paleo bars, skinny bars, fresh bars (chilled), heart healthy bars and even bars for pregnant women. On the indulgent side, dark chocolate and ice cream (small batch, regional and non-dairy) were popular. Chips beyond potato chips (lentil, bean, sprouted, rice) were also in the spotlight. Coinciding with the protein trend, meat jerky made its presence known, in addition to alternate protein (not just growth in plant-based proteins but novel forms such as insects—Chapul energy bars made with cricket flour).

SUBSCRIPTION SNACKS

While snacks are available everywhere (grocers, restaurants, c-stores, warehouse clubs, food trucks, vending machines, etc.), a merchandising innovation is making it effortless for consumers to obtain them. Subscription services, such as Nibblr from General Mills, NatureBox and UrthBox, are shipping snacks directly to consumers. Some services are distinguishing themselves by offering only healthy snacks. Consumers can customize their orders based on need and diet.

Snacking is not simply a fad or trend, it is the future, says James Russo, senior vice president of Nielsen, according to *USA Today*. "Big as snacking is today, it's only going to get bigger."

FOOD SERVICE TRENDS:

TECHNOLOGY, A RAPIDLY GROWING COMPETITIVE FORCE

Good food, a pleasant atmosphere and friendly service are no longer enough to secure a loyal customer base in today's digitally connected environment, where speed has become the focus of almost everything Americans do. Consumers, particularly the younger demographic, are accustomed to using technology to connect socially and on a business level 24/7. They expect technology to be part of the restaurant experience as well. Generation Z and Millennials have no desire to wait in line or engage in any verbal dialog with restaurant staff to place an order or pay their check. Customers want to be able to order and pay with the tap of a finger. Speed, simplicity and accuracy are key priorities.

Technology is moving forward and so are many food service operators as they integrate new technology in their restaurants to engage more effectively with their customers and stay ahead of the competition. Clearly, the adoption of technology has become a necessity and is redefining the way companies conduct business.

Wendy's—is boosting its game plan. The Ohio-based restaurant chain, which rolled out mobile payments last year, is testing mobile ordering, self-order kiosks and voice ordering from cars. Also, the company opened a technology center in May. The center, near The Ohio State University, houses a cross-functional team of approximately 25 IT and digital marketing professionals, according to *Columbus Business First*.

Pizza Hut—is testing new technology allowing customers to order and pay for a pizza from their car with Visa and Accenture. Consumers use Visa Checkout to pay and are able to order through Interactive Voice Control. They simply state their order out loud and the car will automatically place the order, reported *San Diego Union-Tribune*.

Domino's Pizza—has announced another new digital ordering platform. Consumers can now place and track orders on Samsung Smart televisions. The TV must be a 2013 or newer model and customers must have a Pizza Profile with a saved Easy Order or recent order. The capability is part of Domino's AnyWare, a new suite of technology that gives consumers the ability to place an order in more ways and on more devices than ever before. Also, the pizza chain introduced the convenience of

ordering from a smartwatch. Customers can use Pebble and Android Wear smartwatches to place and track the progress of their order from the time it is taken, to when it is placed in the oven, and ready for delivery or carryout.

Look out—for more ordering from wrists! According to research firm NextMarket Insights, worldwide sales of smartwatches are expected to grow from 15 million in 2014 to 373 million by 2020—more than a third of today's watch industry, reported *Nation's Restaurant News*.

Chili's Bar & Grill—is rolling out its waitlisting app nationwide this summer. The app will use No Wait technology to allow customers to search for the nearest restaurant and add their names to the waitlist remotely. This technology enables guests to track their place in line and simply show up when their table is scheduled to be ready.



Consumers—use smartphones or tablets for the following activities at least once a month, revealed the National Restaurant Association's Technology Innovations Consumer Survey, according to *Nation's Restaurant News*:

- View menus (31%)
- Look up location, directions or hours (28%)
- Order from restaurant's website or app (27%)
- Read online reviews (23%)
- Use rewards or special deals (23%)
- Make reservations (18%)
- Look up nutrition information (16%)
- Pay for meals (11%)
- Order via aggregate website or app (9%)

PROFILE OF BREAKOUT BRANDS

A watchful eye should be kept on the following concepts, cited among *Nation's Restaurant News'* list of cutting-edge brands, as they are projected to shape upcoming restaurant industry trends.

- Native Foods Café—a Chicago-based fast-casual concept, features an entirely

plant-based menu. The made-from-scratch menu includes dishes such as the Bangkok Curry Bowl (seared tofu steak on top of steamed vegetables, kale, brown rice and lemongrass-ginger-infused coconut milk curry, topped with toasted sesame seeds and cilantro) and the Chicken Run Ranch Burger (a crispy battered "Native Chicken" patty made with soy protein and grains and served as a sandwich with ranch dressing, romaine lettuce, carrots and onions on a whole wheat bun). The 26-unit concept is popular with meat eaters as well as vegetarians and vegans. In fact, approximately 80% of the guests are neither vegetarians nor vegans.

- Lemonade—a Los Angeles-based cafeteria-style concept, touts its fare as "Seasonal Southern California Comfort Food." The 16-unit chain targets customers seeking a quick lunch or a fast grab-and-go dinner with an array of freshly prepared salads, sandwiches and braised items, such as barbecue brisket and beef short ribs. The "choose-your-own adventure" cafeteria experience pairs well with today's customization trend.

- 100 Montaditos—a Spanish-based chain, features montaditos—two-to-three bite sandwiches common in Spanish tapas bars. The sandwiches, on tiny baguettes, are described as made with simple but premium ingredients such as Serrano ham and smoked salmon. Paella, calamari, salads, charcuterie and cheese platters and other heartier food are available. Some American favorites have been added to the menu, including Philly cheesesteak and pulled barbecue pork sandwiches.

- Dog Haus—a "craft casual" concept, is serving all-beef skinless hot dogs and sausages, and Black Angus burgers on grilled King's Hawaiian rolls with exotic toppings. The menu offers selections such as the Sooo Cali dog (topped with wild arugula, spicy basil aioli, crispy onions, avocado and tomato) and Night in Bangkok sausage, a spicy Thai red currywurst with peanut sauce, Asian slaw and crushed peanuts. Customers can also cater to specific tastes with their own creations as they select from some 50 exotic ingredients. Vegetarian fare is also available.

Calendar of Events

JULY

13-15: Feria Alimentaria*
Guatemala City, Guatemala
Hotel Gran Tikal Futura
<http://feriaalimentaria.com>

SEPTEMBER

8-11: Food Ingredients Asia*
Bangkok, Thailand
Bangkok International Trade and Exhibition Centre
<http://www.figlobal.com>

8-10: Seafood Expo Asia*
Wanchai, Hong Kong
Hong Kong Convention & Exhibition Centre
<http://www.seafoodexpo.com/asia/>

OCTOBER

10-14: ANUGA*
Cologne, Germany
Koelnmesse
<http://www.anuga.com>

29-31: Busan International Seafood & Fisheries Expo*
Busan, Korea
Bexco Exhibition Center
<http://www.bisfe.com>

NOVEMBER

4-6: China Fisheries & Seafood Expo*
Qingdao, China
Qingdao International Expo Center
<http://chinaseafoodnews.com>

7-9: SIAL Middle East*
Abu Dhabi, United Arab Emirates
Abu Dhabi National Exhibition Centre
<http://sialme.com>

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

FEATURED PRODUCTS:

Rao's Specialty Foods – New York, NY

Rao's, produces a Lemon Cooking Sauce that is an all-natural blend of lemon juice, red wine vinegar, white vinegar, white wine, fresh garlic, and herbs. This versatile sauce can be used in a variety of dishes. Use it for grilling, roasting, baking and broiling fish, shellfish, chicken, veal, pork, or vegetables. Recreate Rao's Famous Lemon Chicken at home for your family using the recipe on the label. For more information, e-mail info@foodexport.org.



Cape Cod Provisions – Pocasset, MA

Cape Cod Provisions LLC, provides specialty chocolate and fruit confections under the Harvest Sweets®, Cape Cod Cranberry Candy™ and Cape Harvest™ brands. Their product lines include Chocolate Covered Fruits, Chocolate Covered Fruit & Nut Blends, Fruit Truffles and Cookie Snaps in gable-top boxes with artistic, eye-catching graphics of fresh fruit. Their signature Cranberry Bog Frogs® are a unique fun treat as featured on The Food Network & Rachel Ray Show. And for their newest additions...Introducing Harvest Sweets® Dark Chocolate Covered Cherries & Pistachios and Cranberry Orange & Pecans. These unique blends combine chocolate covered whole dried fruits & roasted nuts for sweet & nutty flavors and chewy & crunchy textures all in one bite! For more information, e-mail info@foodexport.org.



Black Swan – Dundee, IL

Since 2003, Black Swan, has produced premium, prestige, All-Natural BBQ Sauces. Their largest client in the USA is Whole Foods and they have received excellent reviews in many publications, including the *Chicago Sun Times*. Black Swan exports to The Benelux, Brazil, Canada and Costa Rica. They can provide custom packaging and welcome the chance to discuss new ideas for products and marketing. All Black Swan products are free of gluten, preservatives and artificial ingredients, and their Clean Gourmet line goes a step further and offers a fresh home-made taste while eliminating GMOs. For more information, e-mail info@foodexport.com.



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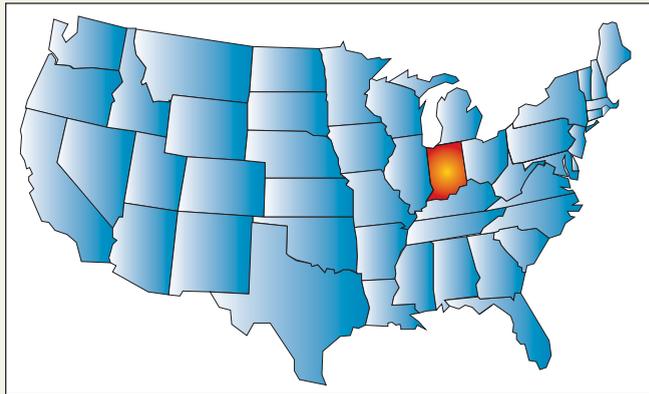
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STATE SPOTLIGHT: Indiana

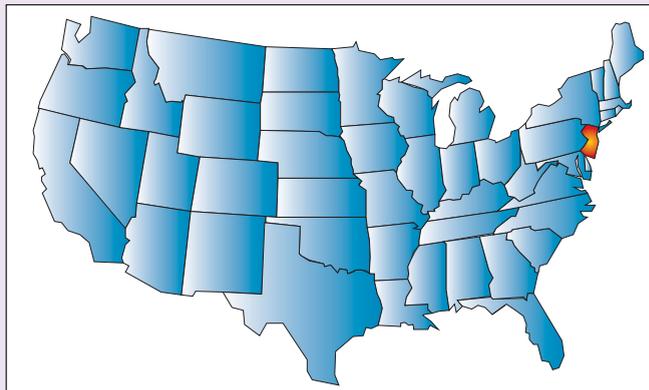


- ✓ There are 60,000 farms in Indiana working 14.7 million acres, nearly two thirds of the total land.
- ✓ Indiana has developed a global reputation for excellence in hardwood tree production and product manufacturing.
- ✓ Indiana's principle agricultural commodities include corn for grain, soybeans, and hogs, dairy and chicken.
- ✓ Indiana's food processing industry includes pet food and feed manufacturing, grain and oilseed milling, fruit and vegetable processing and specialty foods manufacturing.
- ✓ The U.S. Department of Agriculture estimates that up to one third of the production acres in Indiana are to be exported to international customers.
- ✓ Indiana is ranked 10th in national total agricultural production and is also in the top five for crop production, especially corn and soybeans.
- ✓ In 2013 Indiana exported over \$883 million in processed food products, the top markets including Canada, Mexico, Japan, Germany, China and Hong Kong.

2013 TOP AGRICULTURAL EXPORTS:

PORK MEAT, FRESH & CHILLED	
Total Value:	\$166.1 million
FOOD PREPARATIONS FOR INFANTS	
Total Value:	\$73.4 million
MISCELLANEOUS FOOD PREPARATIONS	
Total Value:	\$72.5 million
PORK MEAT, FROZEN	
Total Value:	\$60.1 million
ANIMAL FEED	
Total Value:	\$47 million
CORN, OTHER THAN SEED CORN	
Total Value:	\$46.6 million
NON-ALCOHOLIC BEVERAGES	
Total Value:	\$39.4 million
PREPARED NUTS & SEEDS	
Total Value:	\$37.5 million
DOG & CAT FOOD	
Total Value:	\$32.2 million
BAKED GOODS & SNACK FOODS	
Total Value:	\$24.2 million
FRUCTOSE SOLIDS	
Total Value:	\$23.2 million
CORN SEED, EXCLUDING SWEET CORN	
Total Value:	\$22 million
PORK SHOULDERS & HAMS BONE-IN FRESH	
Total Value:	\$21.6 million

STATE SPOTLIGHT: New Jersey



- ✓ Over 9,000 farms cover more than 733,000 acres, or 15% of the state's land.
- ✓ Farmers in the "Garden State" produce more than 100 different kinds of fruits and vegetables for consumers to enjoy either fresh or processed in New Jersey and elsewhere in the Northeast, in Canada and in many countries around the world.
- ✓ Nationally, New Jersey is one of the top producers of cranberries, blueberries, peaches, bell peppers, cucumbers, spinach, squash, sweet corn, tomatoes and lettuce.
- ✓ New Jersey growers produce hundreds of millions of dollars worth of specialty crops that add a unique flavor to the Garden State's bounty.
- ✓ Vineyards, for example, are a growing segment of the industry, enabling the state's 40 vintners to develop a wide variety of award-winning New Jersey wines.
- ✓ In 2013, New Jersey exported over \$1.7 billion in processed food products, with top markets including Canada, Mexico, United Arab Emirates, Netherlands and Venezuela.
- ✓ Fish and seafood are also a valuable commodity with tons of bluefish, tilefish, flounder, hake, shellfish and other species harvested annually.
- ✓ New Jersey consistently ranks in the top ten in the nation in fish and seafood exports, totaling \$39.6 million in 2013.

2013 TOP AGRICULTURAL EXPORTS:

MISCELLANEOUS FOOD PREPARATIONS	
Total Value:	\$213.4 million
ORANGE JUICE, NOT FROZEN	
Total Value:	\$208.9 million
TEA/MATE PREPARATIONS	
Total Value:	\$141.7 million
BANANAS, FRESH OR DRIED	
Total Value:	\$81.2 million
SOYBEANS FOR OILSTOCK OR CONSUMPTION	
Total Value:	\$79.8 million
GRAIN SORGHUM	
Total Value:	\$76 million
MINERAL, AERATED, FLAVORED WATERS	
Total Value:	\$64.3 million
PROTEIN CONCENTRATES/ TEXTURED SUBSTANCES	
Total Value:	\$58.9 million
DENATURATED ETHYL ALCOHOL & OTHER SPIRITS	
Total Value:	\$55.1 million
COCOA PREPARATIONS NOT IN BULK FORM	
Total Value:	\$52.9 million

NEWS BRIEFS

Wisconsin dairy products are highlighted in China.

A delegation of Wisconsin agriculture professionals recently embarked on a trade mission to boost dairy business in China. Cheese processors and university educators from Wisconsin touted novel products such as cranberry ice cream, ginseng and deep-fried cheese curds to China's agricultural industry in the Heilongjiang province, reported *Milwaukee Journal Sentinel*.

What's trending in the natural food and beverage sector?

Ginger is flavoring everything, turmeric is sprouting in popularity and gluten-free is still strong, according to Rabobank's observation of Natural Products Expo West 2015, featuring more than 2,700 exhibitors. Coconut, another standout, included products such as coconut water, coconut oil and foods that touted their coconut derivative—coconut chip snacks, coconut "corn" flakes breakfast cereals and coconut chocolate bars. Teas were spotted everywhere including Kombucha (fermented fizzy

tea) that ties with the growing interest in probiotic foods. Innovative water products continue to flow: artichoke, caffeinated, ionized, and olive oil. Snack bars continue to multiply. Among other trends: craft sodas, raw everything (minimally processed), dips and sauces (numerous hot sauces including sriracha), alternate protein, gluten-free and popcorn.

Beverage Outlook 2015:

"High protein" and "natural" are projected to be the top trends this year, according to *Beverage Industry's* annual New Product Development Outlook survey. The "high protein" attribute made significant gains in this year's survey, moving up to No. 1 from No. 10, with 42% of respondents listing the attribute as a latest trend. Last year, "healthy" took the lead. It fell two notches this year. Natural attributes are an area of focus for many beverage manufacturers this year. Approximately 70% of survey respondents stated they would incorporate natural flavors into their new products. The response for color usage was

similar, with more than two-thirds of respondents planning to use natural colors in their new product development in 2015. Chocolate is listed as the No. 1 anticipated top-selling flavor for 2015. Coffee made significant gains and entered the Top 10 as No. 2 and vanilla rounded out the Top 3. Respondents also noted that dairy-based and dairy-alternative drinks are among areas of focus this year.

Unique flavors and inclusions are heating up ice cream freezer cases.

Heat paired with sweet, salty and sweet, alcohol-inspired flavors, exotic flavor combinations and a plethora of limited-edition/seasonal flavors are among the latest trends surfacing in ice cream aisles, according *Prepared Foods'* latest review. Ice cream makers are tapping into a variety of sources, from restaurants and chefs to bars and coffee shops, for flavor inspirations. "We see a trend in thinking outside of the box. This means unique ingredient pairings or using ingredients that may not traditionally be found in ice cream," stated Nathan Arnold,

marketing manager for Velvet Ice Cream, Ohio. The company recently added a Bourbon Pecan flavor, made with real bourbon, to its all-natural ice cream line. Pierre Ice Cream Co., Ohio, unveiled Hole Mole—cinnamon ice cream blended with chili chocolate chips, chocolate-covered toffee pieces and a mole fudge swirl. As in other food sectors, salted caramel continues to be a trend in ice cream. These varieties seem endless. Hudsonville Creamery & Ice Cream Company, Michigan, has a Sea Side Caramel flavor (includes caramel sea salt truffles). Along with the salted caramel trend, Derek Scott, director of marketing at Kemps, Minnesota, continues to see candy inclusions as a trend (candy bars, peanut butter cups, chocolate truffles), as well as co-branding and branded flavor names with the leading candy brands such as *Snickers* and *Reese's*. In addition to flavor trends, natural ingredients and clean labels are also important to today's savvy consumers.

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