

# FOODLINK

## U.S.

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

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## MEAL KIT FRENZY



### *Contemporary Solution for Home Cooking*

**T**he meal kit delivery market is sprouting quickly in the U.S. and it is altering the shopping and cooking experiences of the consumers who are subscribing to one of the numerous services. Both the convenience factor and fresh trend are propelling the concept's growth. Currently, more than 100 meal kit companies are delivering millions of boxes to U.S. consumers' doorsteps every month.

This innovative model for securing dinner is right on-trend with today's over-scheduled lifestyles, which leave consumers with little time to plan meals, shop and cook. In addition to time savings and the opportunity to eat fresh meals, meal kits address many other food-related issues that consumers are struggling with. For example, portion-sized ingredients make it easier for consumers to eat the proper amount of food and reduce waste. Eating healthier is simplified with fresh ingredients as opposed to processed food, and consumers can adhere to a specific diet (such as gluten-free, vegan or paleo). For modern consumers with limited cooking skills—and there are many since the art of cooking isn't being passed down generationally—preparing a meal can now become a reality. Cooking at home increases vs. relying on restaurants and take-out options for dinner. Meal kits also provide new and adventurous experiences,

giving consumers the opportunity to use ingredients that they are unfamiliar with or might have trouble finding in the grocery store. And at the end of a busy day, consumers do not have to give any thought to what they are going to eat for dinner. The meal kit provider solves the daily dilemma.

#### HOW DOES IT WORK?

Probably the most difficult part of the meal kit subscription process is perusing through the many services (e.g., Blue Apron, Purple Carrot, HelloFresh) and deciding which type to choose. When signing up with a meal kit service, customers select whether they are ordering for 1- to 2-person household, or family, and pay the required fee. Meal kits arrive at customers' doorsteps in temperature-controlled boxes filled with fresh ingredients such as chicken, seafood, meat, and vegetables, as well as seasonings and spices. With some services, premeasured ingredients are even precut and prepped. Step-by-step instructions, often illustrated on cards or a video, carefully guide consumers through meal assembly and cooking. With little effort, a freshly prepared, home cooked meal can be on the dinner table in 20 to 45 minutes.

*(Continued on page 2)*

MEAL KIT FRENZY *Continued*



In the U.S., the meal kit (fresh food subscription) business will grow to a multi-billion dollar market over the next five years, projects Technomic Inc. The global meal kit market topped \$1 billion in 2015. Worldwide revenues from fresh food subscriptions will surpass \$10 billion by 2020, according to the Chicago-based company.

SOME OF THE PLAYERS

**Blue Apron**—This company, which ships eight million meals a month, touts its service as “a new way to cook.” How-to videos and interactive recipe pages accompany meal kits, with farm-fresh ingredients from family-run businesses. Meats are naturally raised on antibiotic- and hormone-free diets. Blue Apron is working with fisheries to source only sustainable seafood. Original recipes are delivered each week, and never repeated during the year. A glimpse of Blue Apron’s menu includes: Seared Steak and Spiced Potatoes with Sautéed Sugar Snap Peas and Tarragon-Labneh Sauce; Spicy Hoisin Turkey Meatballs and Sautéed Zucchini and Brown Rice and Summer Squash Tempura Tacos with Pickled Red Onion and Cucumber-Jalapeno Salsa. Wine can also be shipped to pair with meals.

**Purple Carrot**—The all-vegan meal kit service ships thousands of meals across the U.S. from distribution centers in Los Angeles, CA and New York. There are seasonal plant-based recipes, perfectly portioned ingredients and colorful recipe cards with photos that show how the meal should look as you’re cooking. These creative meals include: Falafel Hash with Grapefruit-Arugula Tabbouleh; Crispy Rutabaga Rosti with Garlicky Balsamic Spinach; and Jackfruit Enfrijoladas with Coconut Crema.

**PeachDish**—The Culinary Team and guest chefs develop Southern-infused and seasonally inspired recipes. Each meal kit includes a main, side and vegetable dish. A sampling includes: Virginia Willis’ Smothered and Covered Chicken with Herb Grits and Celery Salad; and Cottage Pie with Pork, Carrots and English Peas.

**HelloFresh**—There is a registered dietitian on staff to make sure the meals are balanced

and varied. New recipes are featured weekly and there is a choice of vegetarian and family-friendly options. HelloFresh is fully transparent about the nutritional content of its meals. As long as subscribers have salt, pepper and oil in the house, the box has all the ingredients for dinner. Organic and natural food from local suppliers are included whenever possible. Pan-Seared Pork, Tomato-Garlic Ragu, and Smokey Black Bean Cakes are among the wide assortment of meal kit selections. On an environmentally friendly note, all of the packaging is recyclable.

**FreshRealm**—The California-based company recently announced a major expansion, including the West Coast region of the U.S., to meet rising consumer demand. Following the expansion, FreshRealm will be able to reach 80% of American households. The company’s flexible meal options not only include dinner kits, but breakfast, lunch, snacks, grab-and-go meals and beverages as well. Fully-prepped (cut and portioned), farm-fresh and ready-to-cook ingredients arrive at your doorstep in a climate-controlled, reusable shipping container. A prepaid shipping label is included, and FedEx conveniently picks up the empty state-of-the-art container known as the Vessel. FreshRealm claims its service reduces consumers’ waste footprint by approximately 90%. Meal kit selections include: Pork Chops with Balsamic Mushrooms and Blue Cheese; Sesame Cabbage Salad with Grilled Salmon; Tilapia Tacos with Cucumber; and Steak with Chimichurri Sauce and Fire-Roasted Corn.

teaming up with Tyson Foods to launch a line of chef-inspired meal kits for home delivery. Tyson CEO Donald J. Smith noted that the company will provide the protein for the venture, called Tyson Taste Makers, and AmazonFresh, Amazon’s grocery delivery arm, will source ingredients and make deliveries.

Tyson Foods, a leading producer of chicken, beef and pork, will be doing the time-consuming work for consumers, reports Smith, according to *Food Business News*. “We’ll help pre-cut, trim, dry age, smoke, marinate, and do the prep so all they have to do is cook it. “And we’ll inspire them to explore and cook with ingredients that they may have never used before,” added the CEO.

Players are aiming to stand out from the next company by offering something particularly unique through their meal kit service. Some startups are moving beyond dinner and offering kits for baking, smoothies and other specialized segments. For instance, Foodstirs ships monthly kits with ingredients and tools to bake chocolate cake pops, vanilla loaf cakes and other treats, reported CBS News. Green Blender in New York ships boxes of cut fruit, vegetables, chia seeds, almonds and other ingredients that can be put into a blender to make smoothies.

Differentiation could be key to beating the competition, since not all meal kit players will survive.

“We don’t know how the market will shake



Competition continues to heat up as more players rush to join the meal kit craze. Even grocers are joining as they continue to battle for consumers’ food dollars. Most recently, executives of The Kroger Company reported the supermarket chain is “very open” to creating a meal kit service or partnering with an existing provider. The Ohio-based retailer operates nearly 3,000 food stores in the competitive U.S. market.

E-commerce giant Amazon is also gearing up to enter the meal kit foray. Amazon is

out in five years, but there’s going to be some big winners, and there will be some folks that won’t make it,” said Erik Thoresen, a principal at Technomic.

Retaining customers may be challenging. Switching from one meal-kit provider to another is tempting since many offer free meals or heavily discounted boxes for new subscribers, added Thoresen.

Presently, the meal kit market is being driven primarily by older Millennials, according to Technomic.

# RETAIL TRENDS:

## EUROPEAN DISCOUNTERS BOOST EXPANSION IN COMPETITIVE U.S. MARKET

Germany-based Aldi and Lidl are banking on Americans' appetite for savings with their ambitious expansion plans. These deep discounters plan to open approximately 2,100 stores in the U.S. through 2018, according to Deutsche Bank. Aldi, already a player in the U.S., expects to add 2,000 limited-assortment stores, while Lidl, Europe's largest grocery chain, will make its debut with approximately 100 stores.



Aldi, which has 1,500-plus stores in more than 30 states, expects to invest \$3 billion in the U.S. to broaden its footprint. The retailer entered the West Coast market in March with eight stores in Southern California and 10 more opened in April, with a total of 45 by the end of 2016. Batavia, IL-based Aldi US, under the ownership of Germany's Aldi Sud, usually seeks out real estate in dense trade areas with strong traffic. It is operating its regional headquarters and distribution center in Moreno Valley, CA, about 60 miles east of Los Angeles. The initial group of California stores is clustered around the Moreno Valley distribution center.

With its entrance into Southern California, Aldi is confronting one of the most competitive grocery markets in the U.S. Gelson's, Bristol Farms and Trader Joe's are local favorites, reported latimes.com. Dozens of farmers markets are scattered throughout the region. Wal-Mart Stores, Inc. and Target have boosted their grocery offerings, and online players Google and Amazon.com are expanding grocery delivery.

"There's no doubt that Southern California is a competitive market, but it's also very competitive in pricing," commented Gordon Nesbit, vice president for Aldi's Moreno Valley division. Aldi plans to stand out from competitors by offering goods of "impossibly high quality at impossibly low prices," emphasized Nesbit.

The discounter's no-frills stores average

10,000 square feet and feature a limited assortment of 1,300 of the most commonly purchased grocery/household products, with an emphasis on private label brands, which account for more than 90% of products sold. Aldi's small, efficient operation also offers USDA choice meats and a variety of fresh produce, including organics, baked goods, beer and wine. Simple merchandising, with most products displayed in boxes, helps Aldi keep costs and prices low. Aldi currently serves more than 32 million customers each month.

In August, Aldi will be accommodating customers further by introducing its first full line of baby products. The Little.burney line will feature 50 products, ranging from infant powder formulas, cereals, toddler snacks and organic puree pouches to diapers and more. Aldi claims every Little.burney product has been tested to meet or beat the national brands on quality, taste and durability, and is affordably priced.

Aldi is also addressing the cage-free trend. The company has begun working with suppliers toward transitioning to a shell egg supply chain that is 100% cage-free by 2025. As its initial step, every Aldi store will carry a cage-free shell option by the end of 2016.

### Millennials Attracted To Savings

When Millennials were asked what would most likely influence where they bought their groceries, the top response was "lower costs or opportunities to save" (50%), revealed a new study by Retale. "Availability of locally-grown or organic products" (38%) was next, followed by "store is close to my house or workplace" (34%).

Lidl, similarly offering a limited assortment of low-priced, private label grocery items, is establishing its U.S. headquarters in Arlington, VA. The deep discount retailer, owned by the Schwarz Group, broke ground on a regional headquarters and distribution center in Fredericksburg, VA, and an additional regional headquarters and distribution center in Mebane, NC.

Unlike Aldi, Lidl has plans for a larger format, but the exact number of these units is unknown. Lidl purchased a 4.1-acre parcel in Fredericksburg, where it will construct a 36,000-square foot store—a sizeable increase from its European format averaging 10,000 square feet. Lidl is scouting for sites in New Jersey, Pennsylvania, Delaware, Maryland, North Carolina, South Carolina and Georgia.

Lidl received approval from the Wilson, Pennsylvania Borough Council to build a store, according to lehighvallelive.com. The proposed 36,000-square foot Wilson store would be located across the street from rival Aldi. The store would sit on 5.7 acres with 163 parking spaces and would be approximately twice the size of Aldi, noted Lidl development manager Michael McGrath. The store would sell popular U.S. brands and imported items.

"We'd like to introduce American consumers to international product," added McGrath.

Pending further approvals, Lidl would start construction in 2017. Additional plans were submitted for a Whitehall Township, Pennsylvania store.

Lidl also intends to open three stores in South Carolina (Columbia, Lexington and Orangeburg) in 2018. Each of the no frills stores will be in the 36,000-square foot range.

The U.S. will be the 27th country where Lidl operates. The discounter currently has more than 11,000 stores across Europe.

Baked goods are prepared daily and fresh fruits and vegetables are delivered each morning at efficient, no-frills Lidl stores, according to the Lidl UK website. While products range from eggs, meat, poultry, tea bags, and Belgian chocolates to award-winning wines, Lidl focuses on keeping it simple and avoiding "range overload." Checkouts are made speedier with barcodes printed twice on most packages. On heavy items, barcodes are larger so the cashier can scan the product while it remains in the trolley.



## IMPACT ON U.S. RETAIL LANDSCAPE

Looking ahead, Deutsche Bank does not expect Aldi or Lidl to have a material impact on the best-positioned conventional grocers in the U.S. However, these deep discounters are likely to exert pressure on weaker-positioned U.S. competitors and will contribute to ongoing industry consolidation, notes Deutsche Bank's analysis.

## Calendar of Events

### SEPTEMBER

**5-7: Feria Alimentaria**  
Guatemala City, Guatemala  
[www.feriaalimentaria.com](http://www.feriaalimentaria.com)  
Expocenter La Inmaculada  
Hotel

**6-8: Seafood Expo Asia**  
Wanchai, Hong Kong  
[www.seafoodexpo.com/asia/](http://www.seafoodexpo.com/asia/)  
Hong Kong Convention &  
Exhibition Centre

### OCTOBER

**16-20: SIAL Paris**  
Paris, France  
[www.sialparis.com](http://www.sialparis.com)  
Paris Nord Villepinte

**29-31: Busan International Seafood & Fisheries Expo**  
Busan, South Korea  
[www.bisfe.com](http://www.bisfe.com)  
BEXCO Exhibition Center

### NOVEMBER

**2-4: China Fisheries & Seafood Expo**  
Qingdao, China  
[chinaseafoodexpo.com](http://chinaseafoodexpo.com)  
Qingdao International Expo  
Center

**6-9: Gulfood Manufacturing**  
Dubai, United Arab Emirates  
[www.gulfoodmanufacturing.com](http://www.gulfoodmanufacturing.com)  
Dubai World Trade Centre

**7-9: Seafex**  
Dubai, United Arab Emirates  
[www.seafexme.com](http://www.seafexme.com)  
Dubai World Trade Centre

**7-10: Food & Hotel China**  
Shanghai, China  
[www.fhcchina.com](http://www.fhcchina.com)  
Shanghai New International  
Expo Centre (SNIEC) China

# FEATURED PRODUCTS:

## Calendar Islands – Portland, ME

Calendar Islands is dedicated to providing its customers with delectable, easy to prepare offerings for retail and food service applications. Owned by hard-working Maine lobstermen and experienced gourmets, Calendar Islands has married culinary distinction to the Maine lobster fishery's more than 100-year history of tradition, quality, and sustainability. With innovative core products like Split Lobster with Claw and Knuckle Meat in the body cavity, to a value added fresh lobster mango salad, Calendar Islands offers a range of quality value-added products. Learn more at <http://www.calendarislandsmaine lobster.com/>



## Frostline® Frozen Treats – St. Louis, MO

As the leader in dry mix soft serve, Frostline® offers vanilla and chocolate soft serve mix with significant advantages over dairy alternatives, empowering you to increase profits, reduce waste, and offer more health-conscious options.

Compared to made-from-scratch and liquid soft serve, Frostline Soft Serve Mix costs less to buy, ship and serve—helping you make more money. With shelf-stable ingredients and an 18-month shelf life, these products virtually eliminate waste, and free up valuable space in your cooler. What's more, it's also free of lactose, gluten, cholesterol, fat, and trans fat, so you can offer it to even the most dessert-deprived consumers.

For more information and complimentary mixing buckets and merchandising, call 800-442-5242 or visit [frostlinefrozentreats.com](http://frostlinefrozentreats.com).

## S.R. Rosati, Inc. – Clifton Heights, PA

Rosati Ice, whose existence spans 104 years is the world's leader in the manufacturing of Italian Ices. With innovative products such as Coconut Water Italian Ices and Mangoñeada Ice, Rosati Ice has a reputation for crafting its ices for different cultures and palates. Scoopably delicious, the cool creamy texture of Rosati Ices combined with its vibrant flavors provides the consumer with a most delectable experience. Made with natural sugar and no high fructose corn syrup, Rosati Ices are also dairy free, gluten free, nut free, fat free and cholesterol free. Have a Rosy Day at <http://rosatiice.com/>





STATE SPOTLIGHT

# Connecticut

- Although small in size with only 4,845 square miles, Connecticut is a large farming state with approximately 6000 farms in operation on 440,000 acres.
- Nursery and Greenhouse products are the top crops accounting for 40% of farm receipts.
- Other important crops include sweet corn, apples, tobacco, and hay.
- The state's most important livestock products are dairy products, eggs, cattle, calves and hogs.
- Connecticut leads the Northeast in aquaculture production by virtue of its oyster industry with more than 70,000 acres of shellfish farms now under cultivation.
- Many farms have added commercial kitchens and bakeries to help diversify their product lines.
- Connecticut tomatoes, onions and peppers, or apples, pears and berries have now been transformed into specialty food items.
- In 2015 Connecticut exported \$171.7 million in processed food products, the top destinations including Canada, Hong Kong, India, Russia, Australia, Malaysia, United Arab Emirates and China.

**2015 TOP AGRICULTURAL EXPORTS:**

Miscellaneous Food Preparations	<b>\$37.7 million</b>
Dog and Cat Food	<b>\$34.3 million</b>
Protein Concentrates, Textured Protein Substances	<b>\$32.2 million</b>
Baked Goods and Snack Foods	<b>\$16 million</b>
Lobster, Live, Fresh & Chilled	<b>\$9.9 million</b>
Potato Chips	<b>\$7.3 million</b>
Undenatured Ethyl Alcohol	<b>\$7.3 million</b>
Vegetable Saps & Extracts	<b>\$5.4 million</b>
Tomato Ketchup & Sauces	<b>\$3.9 million</b>
Eggs of Chicken, Fertilized for Incubation	<b>\$2.5 million</b>
Sugar Confectionery	<b>\$2.2 million</b>



STATE SPOTLIGHT

# North Dakota

- Nearly 90% of North Dakota land area is in use by 30,000 farms and ranches.
- Agriculture is the largest segment of the state's economy and is responsible for almost one-fourth of the state's employment.
- Amber waves of grain – hard red spring wheat, durum and barley – have long been the mainstay of the North Dakota's agricultural economy.
- More recently, the state has become the nation's leading producer of such crops such as sunflowers, field peas, dry edible beans, lentils and canola.
- North Dakota is also a major producer of sugar beets, potatoes and other commodities.
- The state's livestock industry, mostly cow-calf and purebred cattle production, accounts for about 15% of the state's agricultural cash receipts.
- Milk is also a big commodity and the state produces enough in one year to fill over one billion glasses.
- North Dakota ranks in the Top 10 in the United States in the exports of soybeans and products, wheat and products, feed grains and products, and vegetable oils.
- In 2015 North Dakota exported \$179.6 million in processed food products, with the top markets including Canada, Mexico, Japan, Korea, Taiwan and the U.K.

**2015 TOP AGRICULTURAL EXPORTS:**

Wheat (Other Than Durum) and Meslin	<b>\$170.3 million</b>
Corn, Other Than Seed Corn	<b>\$81.8 million</b>
Denatured Ethyl Alcohol & Other Spirits	<b>\$69.6 million</b>
Distiller's Grains	<b>\$61.9 million</b>
Malt, Not Roasted	<b>\$51.4 million</b>
Durum Wheat	<b>\$46.9 million</b>
Soybeans for Oil Stock or Human Consumption	<b>\$46.3 million</b>
Barley for Malting or Other Purposes	<b>\$46.2 million</b>
Peas, Dried, Shelled	<b>\$41 million</b>
Sunflower Seeds	<b>\$32.4 million</b>
Dried & Shelled Lentils	<b>\$32 million</b>

# NEWS BRIEFS

## Digital devices are impacting dining choices in a big way.

More than ever before, consumers are relying on digital devices to make dining out decisions. 81% of restaurant diners search for deals online or on mobile devices on a regular basis, and approximately 1/3 used a deal within the past three months, according to RetailMeNot, Inc.'s new study, *The Evolution of Dining in the Digital Age*. Among the diners surveyed, one in four currently has at least one restaurant-specific mobile app on their smartphone.

## E-commerce activity is on the upswing.

E-commerce is expected to make up as much as 10% of the overall food retail market within 10 years, according to a forecast by Willard Bishop in The Food Institute's "Future of Food Retailing" webinar. E-commerce is growing at almost 10 times the annual growth rate of brick-and-mortar stores.

Meanwhile, Millennials say the primary reason for ordering online is convenience, according to a new report by Retale. Savings was the next most popular answer among the 18-34-year-old demographic. Nearly half (48%) of Millennials ordering online said they were saving time, while 35% said they were saving money.

**Innovative flavors are spicing up dairy cases.** With the rise of indulgent flavor combinations and savory launches, the dairy category is starting to echo flavor profiles

found in baked goods and specialty departments. Prairie Farms Dairy Inc. features culinary-inspired flavored milks in varieties such as Honey Cookie, Sea Salt Caramel and Dark Chocolate Truffle. Promised Land Dairy touts seasonal flavors such as Mint Chocolate Chip, Pumpkin Spice and Midnight Chocolate. Stonyfield introduced Birthday Cake-Flavored tube yogurt, HP Hood launched two new sweet flavors of cottage cheese: Honey & Pear and Maple & Vanilla.

**Top Natural Trends:** Jackfruit, avocados and purple potatoes are among the top nine natural and organic food trends that will be highlighted on menus and mainstream packaged goods in coming months, according to the Sterling-Rice Group.

**Organic sales hit a new record!** Organic food sales in the U.S. soared to \$39.7 billion in 2015, up 11% from the previous year, according to the Organic Trade Association's *2016 Organic Industry Survey*. Organic produce was the largest category with sales of \$14.4 billion, up 10.6%. In addition, fresh juices and drinks saw robust growth of 33.5% in 2015, making it the fastest-growing subcategory. Dairy was the second largest organic food category with sales of \$6 billion, up more than 10%.

**Cold coffee is hot!** U.S. coffee shops are experiencing a soaring demand for high-end iced coffees, with many saying they now serve more cold coffee than hot.

Starbucks is expanding its portfolio of products with an assortment of launches, including Doubleshot espresso on ice and a caramel iced macchiato. Coffee makers are also making a push to get more premium, lower-calorie and low sugar cold brews and lattes, packaged in bottles and cans, on grocery store shelves. Euromonitor International expects the U.S. ready-to-drink coffee market will reach nearly \$3.6 billion by 2020, reported Bloomberg.

**Pickled ingredients are making a strong showing on restaurant menus.** The pickling trend, not only prominent at upscale eateries, is growing among foodservice establishments. From burgers to tacos, pickled ingredients are adding a unique texture and flavor profile to various items. However, chefs are awakening consumers' palates by creatively adding many types of pickled vegetables, fruits (celeriac, parsnips, pumpkin, grapes, pears, mangos etc.) and fish to menus. The pickling craze is especially being fueled by health-conscious consumers seeking health benefits from the fermentation process.

**Specialty food sales swell!** Specialty food sales hit \$120.5 billion in the U.S. in 2015—up 21.2% from 2013, according to *The State of the Specialty Food Industry 2016*. Retail specialty food sales reached \$94 billion in 2015, a 19.7% jump since 2013. Sales at foodservice outlets grew at a faster pace—27% and rose to \$26.5 billion.



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