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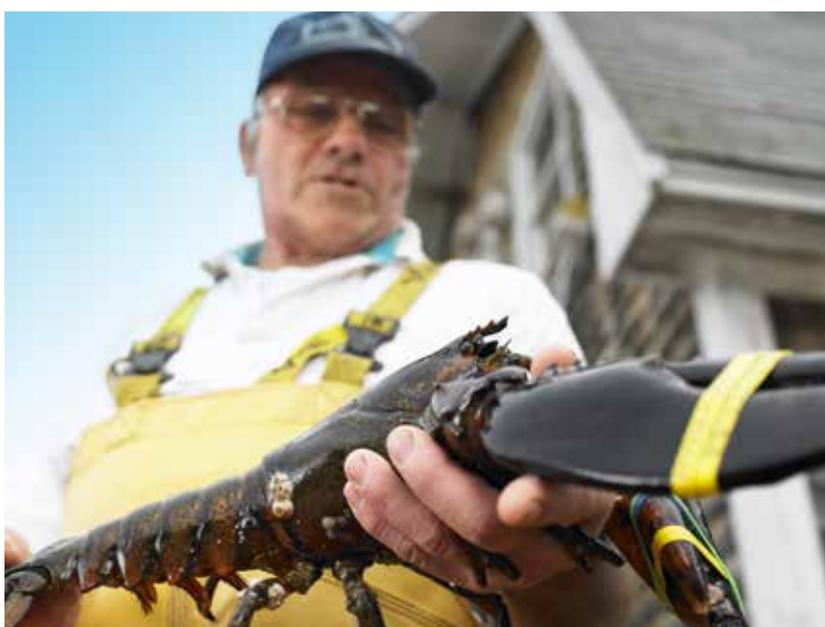
U.S.

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

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U.S. SEAFOOD SNAPSHOT:



Bountiful Harvests Sustainably Produced

Consistently abundant harvests of fresh fish and shellfish, secured in a sustainable manner, continue to reflect America’s healthy and lucrative fishing industry. Through the country’s well-managed programs, including aquaculture, consumers in the U.S. and abroad are able to enjoy a diversity of seafood.

The latest findings reveal that U.S. commercial fishermen landed 9.5 billion pounds of fish and shellfish in 2014, valued at \$5.4 billion, according to the National Oceanic and Administration Fisheries (NOAA). Both the volume and the value, similar to the prior year, continue to remain higher than the average for recent years (five-year average is 9.1 billion pounds).

Once again, Alaska led all states in both volume (5.7 billion pounds) and value (\$1.7 billion) of landings. Two states in the Northeast region of the U.S. captured the number 2 and 3 ranks in terms of value of landings: Maine (\$547.7 million) and Massachusetts (\$524.7 million), according to the new edition of NOAA Fisheries’ annual report, *Fisheries of the United States, 2014*.

The top commercial fishing ports in the U.S. are Dutch Harbor, Alaska and New Bedford, Massachusetts. For the 18th consecutive

year, Dutch Harbor led the nation as the port with the highest volume of seafood landed (762 million pounds valued at \$191 million). Alaska Pollock made up 87% of the volume and 42% of the value. Snow crabs and king crabs accounted for an additional 40% of the value of Dutch Harbor landings and 3.3% of the volume. For the 15th consecutive year, New Bedford had the highest valued catch (\$329 million for 140 million pounds) due primarily to the highly valued sea scallop fishery. Sea scallops account for 77% of the value of landings in this bustling Massachusetts port.

“Seafood is big business in our country, and National Oceanic and Atmospheric Administration Fisheries (NOAA) will continue to work as hard as we can to manage America’s fisheries, so our fishermen can continue to provide this important food source for all of us,” stated Eileen Sobeck, assistant NOAA administrator for fisheries.

The popularity of seafood ties in with today’s healthy eating trend. Seafood is a lean source of high-quality protein, an important source of Omega-3 fatty acids, and rich in vitamins and minerals. The average American consumed 14.6 pounds of fish and shellfish in 2014, almost unchanged from a year earlier, according to NOAA.

U.S. consumers spent an estimated \$92 billion on fishery products

(Continued on page 2)

U.S. SEAFOOD SNAPSHOT *Continued*

in 2014, according to NOAA's annual report. This total includes \$61.4 billion in expenditures at foodservice establishments, restaurants and caterers; \$30 billion in retail sales for home consumption; and \$375 million for industrial fish products.

SAVVY CONSUMERS SEEK INFO FOR SMART CHOICES

There is a strong consumer movement underway, particularly among Millennials, seeking complete transparency, environmental consciousness, sustainability and humane treatment. These demands, which are moving from buzzwords to mainstream, are not exclusive to the seafood industry but prevail throughout the entire U.S. food business. Whether shopping in a store for seafood or making a selection from a restaurant menu, consumers want to know where the fish and shellfish come from. Is it local? Is it wild caught or farmed? Is it sustainable? The answers to these inquiries are important in making purchasing decisions. Locally sourced and sustainable seafood are highlighted at the top of the National Restaurant Association's "What's Hot in 2016" menu trends.

While the United States harvests hundreds of varieties of fish and shellfish annually, most Americans still cling to the top four favorites: shrimp, salmon, tuna (mostly canned) and tilapia, identified by the National Fisheries Institute. The seafood industry and environmentally conscious restaurateurs, chefs and retailers are actively trying to broaden consumer preferences by introducing more underutilized choices from our nation's expansive bounty.



SPOTLIGHT ON NORTHEAST FISHING INDUSTRY

Chilly North Atlantic waters yield a dazzling array of fresh fish and shellfish. Lobster, clams, scallops, oysters, halibut, cod, bluefish, mussels, Atlantic salmon, tuna, flounder, herring, mackerel, squid, tilefish, monkfish, mako shark and striped bass are a sampling of the varied selection.

In the state of Maine, commercial fishermen hauled in a record-breaking \$632 million harvest, according to preliminary data from



the Maine Department of Marine Resources. This total reflects an increase of more than \$33 million over the prior record achieved in 2014. Lobster landings dominated in 2015, accounting for approximately 80% of the catch's total value, up from nearly 78% in 2014. Maine lobstermen set a record with a \$495 million catch in 2015.

Maine is the most productive lobster fishing state in the U.S. 2015 represented the fourth consecutive year and the fourth ever in which Maine lobster fishermen landed over 120 million pounds.

"This past year saw a continuation of steady and historic lobster landings throughout the season, said Maine Department of Marine Resources Commissioner Patrick Keliher. "The increase in value reflects growing demand for Maine lobster."

Maine's 2016 lobster season is projected to get off to an early start (two to three weeks ahead this summer), according to scientists at the Portland-based Gulf of Maine Research Institute. The expected early season is attributed to Maine's coastal waters being two to three degrees Fahrenheit higher than normal.

Aquaculture (farmed fish and shellfish) is also a major contributor to Maine's seafood industry. Blue mussels, cod, halibut, soft shell crabs and Atlantic salmon are among the many varieties being farmed.

Massachusetts is home to one of the top ports in the U.S., New Bedford. This busy port is particularly known for its wealth of sea scallops, accounting for half of the scallop production in the nation. Other fruits of the sea include cod, haddock, clams, crabs, flounder, hake, herring, lobster, tuna and more.

A thriving aquaculture industry is also part of Massachusetts' seafood business. Oyster farms are especially big. Tilapia, black sea bass, largemouth bass and several species of trout are part of the state's finfish farming industry.

Montauk, a small coastal town situated on the tip of Long Island, New York, has a robust fishing industry. Commercial fishermen haul in an abundance of seafood

from the North Atlantic Ocean including, striped bass, tautog (blackfish), flounder, fluke bluefish, perch, mako shark, American eel, tuna, lobster, mackerel, herring, tilefish, squid, monkfish, Montauk pearl oysters, porgies, sea robin, skate and dogfish.

While consumer demand is always high for familiar favorites such as flounder, striped bass and tuna, there are many great alternatives among underutilized varieties such as porgy, sea robin and dogfish. However, it often takes aggressive promoting and creative chefs with tantalizing recipes to get consumers to give unfamiliar species a try. Sometimes, even a new name is given to so-called "trash" fish (i.e., porgy now has a more upscale name, Montauk sea bream).

Dock to Dish, a community-supported fishery in Montauk, is successfully doing its part in getting local, underutilized seafood to restaurants and consumers. Through the member-based program, restaurants are guaranteed to receive wild, sustainable, seafood within 24 hours of when the catch hits the dock. The membership fee guarantees a weekly delivery of 100 pounds of seafood. Restaurants receive 50 pounds of premium catch, which might include striped bass, scallops or tuna, and 50 pounds of bycatch such as porgy, skate or sea robin, according to *The New York Times*.

Chef Michael Chernow, founder of Seamore's, a sustainable seafood restaurant in New York City, is aiming to shift consumers' taste buds by offering only the abundant species from the sea. You won't find popular fish such as tuna of the menu, but you will find innovative tacos made from Montauk dogfish; a crispy skate sandwich with pickled peppers and special sauce; smoked bluefish Caesar salad and porgy dishes. One of the new menu items, Montauk Fish Burger, is creatively prepared with underutilized fish from Montauk's docks. The menu is always based on sustainable, daily landings, as opposed to being dictated by popular opinion. "All the fish is 100% traceable back to the vessel and captain," emphasizes Mr. Chernow.

FOOD SERVICE TRENDS:

SURGE IN SNACK-SIZED PORTIONS AND BOWLS REFLECT NEW EATING STYLE

Americans' snacking frenzy is driving more restaurant operators and chefs to scale back portions. Adapting to changing eating behaviors is critical to restaurant operators as the circle of competition has expanded rapidly to encompass many on-trend food retailers, drug stores, e-commerce businesses and more.

The rise in snacking has created three snacking dayparts in restaurants—mid-morning, late afternoon and late night. Together, these snacking dayparts make up 18% of all restaurant dining occasions, according to The NPD Group. This now represents one percentage point larger than breakfast in terms of number of visits. And, that does not count the numerous times when traditional meals are transformed from a sandwich at lunch or an appetizer and entrée at dinner to a sharable snack, or a lighter meal for budget- or calorie-conscious consumers, outlined *Nation's Restaurant News*.



New snack-sized menu options, catering to consumers' desire for smaller bites more often throughout the day, range from assorted sliders (mini bun sandwiches) to little burritos, mini wraps and other tasty tidbits. For instance, Arby's, known for its hearty sandwiches, now features several sliders (roast beef, chicken and ham). Taco Bell is out with smaller burritos called Grillers, and fast food giant McDonald's is testing Mac Jr., a small and more portable version of its Big Mac burger sandwich. Genji Izakaya, a new restaurant inside a Whole Foods Market in New York City, specializes in petite fare such as sliders on steamed buns filled with chashu pork, shrimp tempura, spicy chicken or tofu, as well as mini bowls of ramen.

Bowl entrees are another hot trend. Customers perceive bowl entrees as neat, convenient, comforting and wholesome, according to *Nation's Restaurant News*.

Bowls fill a middle ground between a sandwich and a salad, notes Olly Smith, Pret A Manger's vice president of food (USA). "A salad keeps you busy eating for a

period of time, but it doesn't keep you full the whole afternoon."

Pret's bowls, designed to fit in the palm of a hand for on-the-go convenience, feature varieties such as Southwestern Chicken & Avocado and Roasted Parsnip & Pistachio.

The Sweetgreen chain touts seasonal bowls such as the Umami Grain Bowl which is filled with quinoa, faro, Swiss chard, roasted mushrooms, red onion, roasted tofu, pea shoots, spicy sunflower seeds and miso sesame dressing.

While most entrée bowls are savory, there is a blossoming category of fruit-based bowls that are similar to deconstructed smoothies. For example, the California-based Vitality Bowls chain features acai-based bowls with a thick blend of the antioxidant-rich Amazonian fruit, topped with grains, fruit, organic granola and other healthy ingredients.

BREAKOUT BRANDS TO WATCH

Nearly a dozen emerging restaurant concepts are poised to impact the industry in a big way, according to *Nation's Restaurant News*. These breakout brands, scattered in several cities across the U.S., represent varied segments (quick service, fast casual, casual dining, coffee and fine dining) and feature different menus. All of the restaurants that are included in *Nation's Restaurant News'* 2016 list of cutting-edge brands provide customers with a unique dining experience. Here is a sampling of these concepts:

By Chloe—a New York City-based fast-casual concept, features items such guacamole burgers, pesto meatball sandwiches, matcha kelp noodles, quinoa taco salad and cold-pressed juices. The menu is completely vegan but designed to appeal to non-vegans as well. Everything is made from scratch, including condiments and sauces. The restaurant is committed to using seasonal and locally sourced ingredients whenever possible. Co-owner and award-winning chef Chloe Coscarelli also prepares fresh-baked goods daily. Matcha blueberry muffins and raspberry tiramisu cupcakes are among her sweet creations. There are also homemade baked goods—pupcakes and organic peanut butter bones—for man's best friend. Two more locations will open this summer.

Sweetfin Poke—a Santa Monica, CA-based fast-casual restaurant based on the Hawaiian dish poke (raw fish salad). Sweetfin Poke specializes in bowls made with fresh fish (albacore or yellowfin tuna, salmon

or snapper) over a base of bamboo rice or kelp noodle-cucumber slaw. Vegan and vegetable-based options are also available. Customers can choose sauces such as creamy togarashi and sriracha ponzu, and toppings like avocado, seaweed or jalapeno. Spicy yuzu salmon on kelp noodles with edamame and spicy tuna with citrus kale are among menu offerings. Seth Cohen, one of the restaurant's founders, believes the poke trend is the natural next step to follow sushi, now considered an American staple across the U.S. Five more Sweetfin Poke restaurants are expected to open in the Los Angeles area this year.



Tava Kitchen—an Indian-inspired concept where customers can build their own rice and salad bowls and "burrotis" (wrap sandwiches made from Indian roti bread) from a choice of proteins, vegetables and house-made sauces. Chutneys are ground daily using fresh produce. Tava's sauces are seasoned with spices that are roasted in house in small batches. The California-based chain is planning to expand into Denver, CO.

Eatsa—a convenient, low-cost health food concept that is fused with technology. Customers order customizable quinoa bowls and salads via in-store iPad or phone and pay via credit card. The freshly prepared order shows up in "lightning speed" in a personalized glass cubby. The high-tech system has enabled Eatsa to handle 300 to 400 customers an hour during peak times. The California-based chain plans to open 10 more units in 2016.

Xi'an Famous Foods—a New York City-based fast casual chain specializing in cuisine of the ancient Chinese capital of Xi'an. Its distinctive menu includes spicy cumin lamb, hand-torn noodles, spicy and sour spinach dumplings, stewed pork burgers and spicy cucumber salad. Much of the food is now prepared in a central commissary to maintain consistency and speed up service.

Calendar of Events

SEPTEMBER

5-7: Feria Alimentaria
Guatemala City, Guatemala
www.feriaalimentaria.com
Expocenter La Inmaculada Hotel

6-8: Seafood Expo Asia
Wanchai, Hong Kong
www.seafoodexpo.com/asia/
Hong Kong Convention & Exhibition Centre

OCTOBER

16-20: SIAL Paris
Paris, France
www.sialparis.com
Paris Nord Villepinte

29-31: Busan International Seafood & Fisheries Expo
Busan, South Korea
www.bisfe.com
BEXCO Exhibition Center

NOVEMBER

2-4: China Fisheries & Seafood Expo
Qingdao, China
chinaseafoodexpo.com
Qingdao International Expo Center

6-9: Gulf Food Manufacturing
Dubai, United Arab Emirates
www.gulffoodmanufacturing.com
Dubai World Trade Centre

7-9: Seafex
Dubai, United Arab Emirates
www.seafexme.com
Dubai World Trade Centre

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



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>	 <p>SQUID</p> <table border="0"> <tr> <td data-bbox="1113 1780 1254 1848"> <p>LONG-FINNED BOSTON/WINTER SQUID <i>Loligo pealei</i></p> </td> <td data-bbox="1317 1780 1450 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>
<p>LONG-FINNED BOSTON/WINTER SQUID <i>Loligo pealei</i></p>	<p>SHORT-FINNED SUMMER SQUID <i>Illex illecebrosus</i></p>			



STATE SPOTLIGHT
Illinois

- Illinois’ 73,600 farms cover nearly 27 million acres – over 73% of the state’s total land area, including some of the most fertile soil in the world.
- Illinois is a leading U.S. producer of soybeans, corn and pork.
- The state’s climate and varied soil types enable farmers to grow and raise many other agricultural commodities, including cattle, wheat, oats, sorghum, hay, sheep, poultry, fruits and vegetables.
- With 2,640 food manufacturing companies, Illinois is well-equipped to turn the state’s crops and livestock into food and industrial products for export sales.
- Illinois has a competitive edge in agricultural exports due to its central location and superior transportation system.
- Illinois ranked fifth in the nation in the exports of food and agricultural products in 2015, totaling over \$7.1 billion.
- In 2015 Illinois exported over \$2.3 billion of processed food products, the top markets including Canada, Mexico, China, Japan, United Arab Emirates, Australia and United Kingdom.

2015 TOP AGRICULTURAL EXPORTS:

Soybeans, Whether Or Not Broken	\$1.5 billion
Distiller’s Grains	\$718.8 million
Corn, Other Than Seed Corn	\$703.7 million
Miscellaneous Food Preparations	\$350.4 million
Protein Concentrates & Textured Substances	\$203.2 million
Pork Meat, Frozen	\$198.7 million
Starch Residues	\$152.1 million
Baked Goods and Snack Foods	\$141.6 million
Cocoa Preparations, Not In Bulk Form	\$116.3 million
Beef, Boneless, Frozen	\$110.1 million
Animal Feed Preparations	\$108 million
Sugar Confectionery	\$96 million
Soybean Oilcake	\$92.6 million



STATE SPOTLIGHT
Rhode Island

- The “Ocean State” has 1,250 farms covering over 70,000 acres, over 10% of the total land.
- Rhode Island’s most important agricultural commodity is its greenhouse and nursery industry, which provides over 45% of the state’s total agricultural receipts.
- Sweet corn, apples, potatoes and hay are also important crops for the state.
- The state ranks in the top 10 in the nation in organic sales as a percent of all agricultural sales.
- Rhode Island livestock products include dairy products, cattle and calves, aquaculture (primarily oysters and hard clams), hogs, and farm chickens.
- In 2015 Rhode Island exported \$41 million in processed food products to the world, including top markets such as China, Canada, Vietnam, Hong Kong and Mexico.
- In 2015 Rhode Island exported \$35.2 million in fish and seafood products, ranking it 11th in the nation.

2015 TOP AGRICULTURAL EXPORTS:

Lobsters, Live, Fresh, Chilled, Dried	\$11.7million
Cuttle Fish & Squid, Frozen or Dried	\$11.3 million
Ethyl Alcohol, Undenatured, Alcoholic Strength by volume of 80% or higher	\$9.3 million
Ethyl Alcohol, & Other Spirits, Denatured, of Any Strength	\$6.4 million
Miscellaneous Food Preparations	\$5 million
Sausages & Similar Products	\$4.3 million
Herrings, Frozen	\$3.4 million
Frozen Fish	\$2.3 million
Inedible Fish Products	\$1.1million
Crabs, Including In-Shell, Frozen	\$986.3 thousand
Pork, Prepared & Preserved	\$886.8 thousand
Baked Goods & Snack Foods	\$826.5 thousand
Peanuts, Prepared/Preserved	\$656.9 thousand

NEWS BRIEFS

Unattractive fruit and veggies gain recognition. Spurred by the growing concern of massive food waste in the U.S., retailers are giving customers the opportunity to purchase less-than-perfect fruits and vegetables. Giant Eagle is selling discounted “ugly” produce as part of a pilot project at five Pittsburgh, PA area stores. Another retailer, Whole Foods Market partnered with Imperfect Produce to sell unattractive fruit and vegetables in some Northern California stores, reported *NPR*.

Innovative technology to benefit retailer and consumer. Target Corp. is testing an in-store spectrometer in Boston, MA that scans produce to determine its age, nutritional content and how many calories it contains. The Minnesota-based retailer could take the data collected to create a baseline that could impact pricing, such as selling fresh produce for more than ripened produce, reported *Minneapolis/St. Paul Business Journal*.

A glimpse of what's trending in natural foods and beverages. An avalanche of innovative products dazzled attendees at Natural Products Expo West 2016, where more than 3,000 exhibitors featured their lines. Grain-free products, probiotics, heirloom fruits and vegetables, and products with fat were buzzing with activity, according to *The New York Times*. Also hot were vegan products, as well as unique flavored teas, fruit

and vegetable juices and naturally flavored waters.

Who's doing the most snacking? Surprisingly, Baby Boomers are snacking more than Millennials. Boomers consume ready-to-eat snack food 20% more often than Millennials, according to The NPD Group. Each Boomer gobbles down approximately 1,200 snacks annually, while Millennials consume approximately 1,000. However, kids beat both generations. Kids, ages 2-17, chow down an average of 1,500 snacks per year! They also rank highest in healthy snack eatings.

Spicy flavor combinations continue to heat up. More than three-quarters (78%) of Americans enjoy at least moderately spicy foods, and 55% crave spicy flavors, according to Technomic research. However, consumers are beginning to look beyond merely “spicy” for indicators of heat on menus. Mentions of specific pepper types (i.e., jalapeno, habanero, serrano, etc.) are growing in importance, as are sweet-heat mashups, reported Prepared Foods. Consumers are interested in more complex spicy notes as opposed to simple heat.

New app plans healthy meals and reduces waste. A newly unveiled mobile app called eGrocer is set to tackle consumers' daily challenge of eating healthy within a specific budget, while also slashing food waste. eGrocer makes meal

and diet suggestions based on users' body mass ratios and activity levels. Efficient pantry management is also included in the app's features. Consumers create an inventory of their ingredients, then the app automatically updates shopping lists based on what is remaining. eGrocer even offers advice on how to make optimal use of the pantry.

Almond milk craze is on trend. Almond milk is now America's favorite milk substitute. Sales of almond milk grew 250% over the past five years, bringing its share of the total milk market to 5%, according to Nielsen. Almond milk accounted for approximately \$894.6 million in sales in 2015, more than twice the sales of all other milk substitutes combined.

More consumers are turning to retailers for prepared foods. Eighty-four percent of consumers purchase prepared food from retailers at least once a month, compared to just 79% in 2012, according to an updated study by Technomic. This increase is primarily driven by Millennials. Almost half of all respondents visit fast food restaurants less often as a result of increased retail meal purchases. While only 19% of consumers have ever purchased meals from a drugstore, 43% of those who do so buy them at least once a week.



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