

U.S. FOODLINK

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U.S. Grocery Shopper Trends 2016

Shared Shopping and Multiple Channels Dominate

More consumers are involved in grocery shopping than ever before, and the majority of U.S. households are co-shopping to satisfy their needs, according to the Food Marketing Institute's report "U.S. Grocery Shopper Trends 2016." Contemporary lifestyles, evolving household dynamics, digital penetration and heightened focus on health, transparency, environmental issues and animal welfare are among the factors that are influencing where and how consumers shop for groceries, according to this year's analysis, done in collaboration with The Hartman Group.

Currently, an overwhelming majority of U.S. adults (85%) play a significant role in food shopping—reporting they are responsible for at least 50% of the grocery shopping for their household. Men continue to propel the increase in overall shoppers and narrow the gap with women. A hefty 79% of all adult men are significant grocery shoppers in their households—up from 73% last year. Meanwhile, 90% of all adult women are significant grocery shoppers.

This growing shift is contributing to more households advancing from a Primary shopper paradigm, where one person does it all, toward a Shared shopper paradigm. Fragmented tastes, food preferences, diets (vegan, paleo etc.) and the pleasure of exploring new foods are spurring more adults to go shopping for the household. Nearly three out of five households (58%) are now engaging in some amount of co-shopping. Young Millennials (18 to 27-year-olds) are particularly cited for their increased motivations to co-shop due to differing food tastes. Importantly, the path to shared shopping is unique for each shopper, guided by the intricacies of age, life stage and household dynamics, noted FMI's 2016 report.

Self shoppers and Sole shoppers do all of the grocery shopping. Nearly a quarter (24%) of all grocery shoppers are Self shoppers. (A Self shopper lives in a single-person household.) Only 18% of all grocery shoppers are Sole shoppers (either in a single-parent household or a multi-adult household). Of that total, 14% of Sole shoppers represent single-parent households, and a mere 4% are doing all the shopping in a household that has multiple adults.

(Continued on page 2)



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WHERE ARE CONSUMERS SHOPPING?

Consumers are continuing to divide their loyalties across multiple channels and stores. The last decade exhibited a slow but steady shift of shoppers away from traditional supermarkets as primary store to other channels such as supercenters, club stores and limited assortment retailers. While a significant number of shoppers are no longer claiming any one store as their primary outlet for groceries, those shoppers who do now cite limited assortment and discount retailers as their primary store.

One in 10 shoppers reported shopping an online channel for groceries in the past 30 days—up three percentage points from a year prior. The trend is expected to move forward as the younger demographic, Millennials, are the most active group in online grocery shopping. More than one out of every four Millennials is shopping for groceries online.



Consumers are seeking fresh and less processed foods with simple ingredients.

Just 10% of Americans say online food shopping has replaced some or all of their routine grocery shopping trips, according to a recent Harris poll. Leading the way in online grocery shopping are Millennials, college graduates, parents and people in urban areas. A majority of online food purchasers say they are most often seeking something special that they can't find at the grocery store, according to the survey.

RELIANCE ON DIGITAL TOOLS

While online grocery shopping is still relatively small, shoppers are using digital tools prior to and during grocery shopping trips. Digital coupons are being retrieved as well as product reviews/location, recipes, weekly promotions and other information to maximize the shopping experience. Millennials are most likely to engage with retailers using social media or other digital tools. Texts and calls via smartphone, particularly among co-shoppers, are now part of the shopping routine to make certain desired products are brought home.

Sam's Club, a division of Wal-Mart Stores, Inc., introduced innovative Scan & Go shopping in its new Columbia, SC store. The mobile app, designed to speed the checkout process, allows customers to scan items' UPC codes on their smartphone while loading them in their carts. When they are finished shopping and ready to check out, customers can pay directly on their phone from anywhere in the club store and bypass the checkout line.

Many consumers continue to embrace digital tools as an extension of the shopping trip. Computers and

smartphones are frequently being utilized to assist with cooking (i.e., nearly half are regularly looking up recipes online) and share food experiences.

Lower prices are a motivator for traveling a distance for groceries, according to the report. Half of shoppers bypass the closest store usually for lower prices. However, low prices are less important if they are not paired with better quality and selection of fresh foods (produce, meat, prepared foods, bakery, etc.).

HEALTHY EATING TREND DRIVING PURCHASES

Nutrition is a key concern among today's consumers. Four of every five shoppers express concern about nutritional content in their food, and this is consistent among all generations. Consumers are seeking fresh and less processed foods with simple ingredients. Also, positive nutrition through nutrient dense foods and foods with health benefits are being sought. Sixty-six percent avoid negatives and look for product claims such as low-sodium, -sugar, -fat, -carbs, and no trans fats, artificial ingredients, preservatives or GMOs. A strong 89% of shoppers believe eating at home is healthier than eating at a restaurant. Thus, grocery retailers are well-positioned to assist them with their desire to eat healthier.

Three out of four shoppers switched to a healthier version of at least one type of food in the past year, with healthier yogurt, milk and bread topping the list, according to the Food Marketing Institute and Rodale Inc.'s "2016 Shopping for Health." In addition, shoppers are now buying more whole grain, high fiber, multigrain, all natural, low sodium and unprocessed whole foods. The majority (67%) try to purchase a mix of foods that will offer different health benefits (i.e., vitamins, protein, antioxidants, etc.).

REACHING FOR PRIVATE BRANDS

Consumers are likely to be reaching for private brands when it comes to fresh products. More shoppers purchase private brands when it comes to fresh-perimeter items such as produce, dairy, meats and fresh baked goods than other categories, according to FMI's Trends report. This purchasing pattern is similar with packaged and canned foods. Nearly six in 10 shoppers select private brands when purchasing packaged and canned foods, revealed the report. However, when it comes to sweets, snacks, pet care, health & beauty and cleaning products, shoppers are more likely to select a national brand.

In terms of shopping trips, the average total trips per week stands at 1.6—up from 1.5 trips in 2015. Average weekly grocery spending is \$107.34 vs. \$100.80 a year ago.

MEAL PREPARATION/COOKING

Shoppers, on average, eat home-cooked meals 4.5 nights of the week, according to 2016 Shopping for Health findings. Sixty-seven percent of shoppers who are eating home-cooked meals at least once a week usually spend 20-50 minutes on preparation. While nearly half (47%) say they are cooking from scratch and are using only fresh ingredients *all the time/often*, many shoppers report using a mix of canned, frozen, fresh, and/ or ready-to-eat foods.

Foodservice Trends

FIVE STANDOUT TRENDS TO IMPACT MENUS

Today's consumers are driving dramatic changes throughout the food service industry. Attitudinal shifts are evident, explained Nancy Kruse, president of The Kruse Company, Atlanta, GA, during a presentation at the 2016 National Restaurant Association Restaurant show. New attitudes and expectations toward menus, ingredients and transparency are affecting innovation industrywide.

Five key trends, identified by Kruse, are currently shaping menu innovations, outlined *Food Business News*.

SPOTLIGHT ON SIMPLE

It's all about simplicity! Consumer demand for simple ingredients is now mainstream. Consumers are actively seeking foods that are clean and free from artificial sweeteners, antibiotics and G.M.O.s, noted Kruse.

McDonald's Corp. is among the many chains that are engaged in cleaning up their menu. Earlier this year, the fast food giant registered the phrase "The simpler, the better" for potential use in marketing, and McDonald's is testing a menu called Simple Delights in Southern California.

"One of the interesting facets to this whole phenomenon is that it's one of the very rare food trends that began on the supermarket side and then migrated to food service, added Kruse. "About 95% of food trends in this country start in food service and work their way gradually into the retail grocery channel. This has been just the opposite."

favoring diet consumables have shifted to real food as a way to maintain health.

"What they're really doing is taking a more holistic approach and asserting their control over their lives," said Kruse.

Approximately three-quarters of consumers (77%) say they are trying to eat more healthfully, but only 19% say they are on a diet, according to a *Fortune* magazine poll.

Vegetables rule in terms of the healthy eating movement.

"It's all about plants and plant-centric dining," emphasized Kruse. While plants are replacing meat on menus to align with an emerging flexitarian lifestyle, they also may serve as a substitute for grains. For example, the Houlihan's chain introduced dishes featuring noodles made from zucchini.

What's next in better-for-you foods?

"It's going to be all about better sugar," says Kruse. "We know the bad sugar is the refined stuff. The better sugar is the sugar that comes in with some sort of credentials. Watch the consumer acceptance of cane sugar, pure cane sugar and organic sugar."

COMFORT FOOD COMEBACK

Presently, menus are experiencing a "fat" revolution, according to Kruse. Millennials are the demographic leading the movement, noting animal fats are unfairly criticized. These consumers are more likely than older generations to use beef tallow, lard and duck fat. Households with kids record the highest increases in fat consumption. This is attributed to the image of minimal processing, notes Kruse.

Fried foods continue to be a comfort food favorite among U.S. consumers.

Nashville hot fried chicken is especially trendy on menus at this time. The regional chicken specialty of Nashville, TN, which has spread to other areas of the U.S., is marinated in a blend of spices, floured and fried. The chicken is finished with a paste that has been spiced with cayenne pepper and served on slices of white bread with pickle chips.

Other comfort foods are returning in popularity including bologna, an ingredient in gourmet sandwiches on the menu of some independent restaurants, and porridge. Also, there is congee (rice porridge), a familiar comfort food for Asian diners, added Kruse.



BREAKFAST AROUND THE CLOCK

Breakfast foods, also associated with comfort, have expanded far beyond the morning. More than half of consumers enjoy breakfast at nontraditional times, creating a major opportunity for menu innovation, noted Kruse. Convenience, indulgence, health, value and fun are all part of the lure of breakfast foods.

Last year, McDonald's launched all-day breakfast nationwide and it has "gone gangbusters," Kruse said. This success has spurred other restaurant chains to add creative breakfast items to the menu. For example, the White Castle burger chain rolled out a waffle breakfast slider, and Carl's Jr. and Hardees debuted a breakfast sandwich on an Auntie Anne's pretzel bun. Shari's, a regional family dining chain, serves breakfast poutine, featuring fries topped with cheese, bacon and an egg.

Looking ahead, cereal is expected to add a novel twist to offerings. Kruse forecasts a rise in ready-to-eat cereal making some unexpected appearances on menus. Already, a colorful hot dog served at a baseball stadium in Cleveland, OH is popping up on menus in other parts of the U.S. The grilled hot dog, nestled in a bun, is topped with macaroni and cheese, bacon and crunchy Froot Loops cereal.

ETHNIC EXPERIMENTATION

Restaurant operators are exploring new areas of the world for culinary inspiration as part of an ongoing effort to satisfy consumers' adventurous palates.

More than 60% of consumers surveyed by Technomic Inc. order ethnic foods to "look for something different" or discover new flavors, reported *Food Business News*.

Chefs are combining global flavors with familiar formats. For example, falafel, a traditional Middle Eastern food, is surfacing in burgers and on pizzas. Gochujang, a savory, spicy and pungent fermented condiment, is appearing on menus as "Korean barbecue sauce."

Get ready for the next big ethnic cuisine, Cuban food, predicts Kruse.



DOWN WITH DIETING

Regimented diets, diet food and beverages and weight loss centers are no longer popular with contemporary consumers. Attitudes formerly

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: Gulfood Manufacturing
Dubai, United Arab Emirates
www.gulfoodmanufacturing.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

DECEMBER

1-3: International Bakery Expo
Hong Kong
www.verticalexpo.com/IBE
Hong Kong Convention and Exhibition Center

4-6: International High End Food and Beverage Exhibition
www.fd.cofe-expo.com
Shanghai, China

12-14: Guangzhou Intl. Coffee, Food and Beverage
www.fxhotshow.com
Guangzhou, China

news briefs

Bagged salad kits are booming! Convenience and variety are driving the bag salad trend to new heights. Americans bought twice as many packages of bagged salad greens as heads of lettuce last year, according to the Nielsen Perishables Group. Over the past five years, sales of bagged lettuce have been growing by 6.5% every year. Meanwhile, sales of heads of lettuce have remained flat. Packaged organic salads are growing faster than the average, with a 12% increase in dollar sales over the previous year. Sales of bagged greens and salad kits are projected to reach \$7 billion a year, outlined *NPR*.

Lunch travels to consumer by drone. 7-Eleven Inc. and tech startup Flirtey made the first drone delivery to a customer's home in the U.S. Drone delivery service Flirtey successfully transported Slurpees, a chicken sandwich, donuts, hot coffee and candy to a home in Reno, NV, in a matter of minutes. This delivery marks the first time a U.S. customer has received a package to their home via drone, representing a historic milestone in both U.S. and global commerce.

Outlook is sweet for chocolate. The U.S. chocolate market is projected to reach \$30 billion by 2021, according to a report by Research and Markets. Two key factors are driving growth: an increasing number of product offerings by private label brands, and shifting consumer preferences toward chocolate with health benefits, outlined *specialtyfood.com*. The U.S. is experiencing surging demand for premium, dark and sugar-free chocolates. The sweet and spicy trend is also evident in the chocolate category.

Appetites for non-beef burgers are growing. U.S. consumers want more non-beef burgers on menus. Nearly half of consumers (46%) would like to see more chicken burgers on menus, 42% want more turkey burgers and 34% are interested in seeing bison/buffalo burgers, revealed Mintel research. Interest in non-beef burgers is highest among Millennials, the most likely generation to agree that healthiness of menu items is the most important factor when choosing a restaurant (64%). "Non-beef burgers appeal to diners for a number of reasons," stated Caleb Bryant, Mintel foodservice analyst. "Beyond offering less fatty, more nutritious alternatives, non-beef burgers tend to have a 'wow' factor as they are new and different to many consumers," added the analyst.

Foodservice is on track to lead. Foodservice growth is expected to outpace retail growth in 2017, increasing 4.8% and 3%, respectively, according to Technomic. The Chicago-based company's recently released *2016/17 U.S. Food Industry Universe*, analysis reports that foodservice will account for 60% of industry growth. The five fastest-growing food industry channels are online, fresh format, supermarket fresh prepared foods, limited assortment stores and independent restaurants/small chains. In retail, supermarkets and supercenters will continue losing share to nontraditional channels.

Chickpeas are starring on menus. These nutritious legumes, staples in Middle Eastern and Indian kitchens, are surging in popularity in U.S. restaurants. The primary driver of this expanding trend is attributed to the rising number of fast-casual chains dedicated to Eastern Mediterranean cuisines and the prominence of falafel (fritters or patties made



from ground chickpeas) on their menus, according to *Nation's Restaurant News*. Hummus and falafel in traditional forms are being offered as side dishes or incorporated into menu items such as salads, sandwiches and burgers. However, many chefs are moving beyond tradition and creating extraordinary chickpea launches. Chocolate chip hummus, brownie hummus, cauliflower hummus, cream cheese falafel, sweet potato falafel and jalapeno falafel are among new varieties.

Breakthrough in packaging! USDA scientists discovered a biodegradable food packaging made of milk proteins, reported *Science Daily*. The sustainable packaging film is up to 500 times better than plastics at keeping oxygen away from food and is also edible, meaning it can be sprayed onto foods to prevent sogginess. Current food packaging is primarily petroleum-based, which is not sustainable. It does not degrade and creates tons of plastic waste.

Maple syrup is spreading beyond breakfast foods. The flavorful sweetener, a long-time favorite drizzled on pancakes and waffles, is popping up in salad dressings, cheese, water, fudge, foie gras, cotton candy, cream, cocktails, mustard, seafood and many more categories. With most maple syrup producers across North America reporting a banner year in 2016, look for maple syrup to continue to enhance more food and beverage products.

Vegetable butchers, the next big supermarket convenience? The growing personalization trend in perishables has paved a path for vegetable butchers in produce departments, according to *FoodBusinessNews*. Time-pressed consumers simply select vegetables, bring them to a vegetable butcher, go finish their shopping, and upon return, their vegetables are chopped and ready for snacking or cooking. The convenience-oriented concept is already being featured in a number of stores.

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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State Spotlight
Minnesota

- Minnesota has more than 73,000 farms, working nearly 26 million acres, or over half of the land area.
- Minnesota leads the nation in the production of a number of commodities including sugar beets, processed sweet corn, wild rice, dry beans, oats, corn, soybeans and flaxseed, rye and canola.
- Minnesota's is also a national leader in livestock production; which in terms of market value are turkeys, hogs, animal meats, cheese, honey and milk.
- With close to a 33% share of the state's total exports, food and agricultural production adds more economic contribution than any other single industry.
- Estimates are nearly one third of Minnesota's agricultural production is exported.
- Minnesota direct exports of total agriculture and related products topped \$2.6 billion in 2015.
- Minnesota exported \$788 million in processed foods in 2015, with top markets including Canada, Mexico, Japan, China, Philippines, South Korea and Taiwan.
- Top Minnesota processed food exports in 2015 included baking inputs, bottled drinks, canned vegetables, prepared/preserved pork, whey protein, and other food ingredients and beverage bases, edible fats and oils and baked snack foods.

2015 TOP AGRICULTURAL EXPORTS

Soybean Oilcake & Solids	\$178.3 million
Soybeans for Oilstock or Consumption	\$174.4 million
Animal Feed Preparations	\$128.4 million
Distiller's Grains	\$128 million
Corn, Other Than Seed Corn	\$126.4 million
Denatured Ethyl Alcohol & Other Spirits	\$123.5 million
Pork Meat, Frozen	\$120.9 million
Non-Alcoholic Beverages	\$84.2 million
Starch & Similar Residues	\$78.6 million
Sunflower Seeds, Whether or Not Broken	\$70.8 million
Beet-pulp & Other Waste of Sugar Manufacture	\$60.4 million
Flours & Meals of Soybeans	\$54.3 million



State Spotlight
Pennsylvania

- Pennsylvania has nearly 58,000 farms, covering 7.7 million acres or 27% of the total land.
- The dairy products industry is one of Pennsylvania's fastest growing sectors because of the high quality and technical innovations on the many farms.
- The dairy industry in Pennsylvania produces in three main categories: ice cream and frozen desserts, butter and cheese, and fluid milk products.
- Pennsylvania is known as the "Snack Food Capital of the World", generating over \$5 billion in sales of pretzels, potato chips, confectioneries and chocolate.
- Pennsylvania is also the international headquarters for Hershey Foods Corporation and H. J. Heinz.
- Pennsylvania is a U.S. leader in the value of shipments of canned fruit and vegetable specialty products, chocolate and cocoa products, potato chips and pretzels.
- Pennsylvania exports of processed food products amounted to over \$1.9 billion in 2015, the top markets being Canada, Mexico, South Korea, United Arab Emirates and China.

2015 TOP AGRICULTURAL EXPORTS

Cocoa Preparations, Not in Bulk Form	\$192.5 million
Coffee, Roasted, Not Decaffeinated	\$136.9 million
Miscellaneous Food Preparations	\$126.1 million
Baked Goods & Snack Foods	\$115 million
Chocolate Preparations, In Blocks, Over 2kg	\$85.9 million
Tomato Ketchup & Other Tomato Sauces	\$84.9 million
Cocoa Preparations, Not in Bulk, Not Filled	\$80.8 million
Sauces, Condiments & Seasonings	\$76.3 million
Dog & Cat Food Put Up For Retail Sale	\$70.5 million
Cocoa Butter, Fat & Oil	\$64.7 million
Cocoa Paste, Not Defatted	\$60.4 million

Featured Products

For more information about these Featured Products or other featured products please email: info@foodexport.org.

Big Fork Brands

Chicago, IL

Big Fork is a family-owned craft sausage company that works with family farmers. The artisan sausage is made with antibiotic-free pork and bacon from Berkshire Hogs raised outdoors in Iowa. They start with nitrate-free, uncured, hardwood-smoked bacon and add antibiotic-free pork, dark brown cane sugar, and sea salt. Big Fork Bacon Sausage is naturally-encased and smoked using a combination of hickory and applewood. The sausage is made in the traditional smokehouse way, with one difference: they cram as much bacon into every sausage. Big Fork's philosophy is simple: *bacon makes everything better, and we're making sausage better with BACON. We keep it pure and simple, letting Big Fork's pork and smoky bacon flavors shine.*



SK Food International

Fargo, ND



Healthy Food Ingredients (HFI), the parent company of SK Food International, Hesco/Dakota Organic Products, and the most recent addition, Suntava® Corporation, now offers Suntava Purple Corn®.

Suntava Purple Corn is full of antioxidants and polyphenols, including exceedingly high amounts of anthocyanins, of which HFI is now able to offer in additional processed forms such as a raw flour, meal, or grit; precooked flake, flour or grit; pregelatinized flour; snack grit and sprouted.

Suntava Purple Corn also recently became Certified Gluten Free by NSF. The purple corn is processed at SK Food's processing facility, SK Food Specialty Processing, and is identity preserved by

grower lot. In addition, Suntava Purple Corn is certified organic and Non-GMO Project Verified.

HFI is a growing family of global specialty ingredient brands, including SK Food International, Hesco/Dakota Organic Products and Suntava. Combined, HFI offers non-GMO, organic, certified transitional, gluten-free, and identity preserved ingredients, primarily pulses, grains, seeds, soybeans, expeller oils, and Suntava Purple Corn®. The company is dedicated to delivering safe, healthy, premium-quality ingredients and supply assurance using a diverse, long-standing grower network and the highest safety standards. Learn more at healthyfoodingredients.net.

Mangé

Somerville, MA

The amazing health benefits that vinegar has on the body have only been recently realized in the past few years. Fresh Fruit Vinegars from Mangé is a unique blend of Fresh Fruit with high quality vinegar helping brings a crisp fruit taste to meals. Our distinctive process brings through the taste of the fruit with the shelf stability of a vinegar. Not only do you get great taste and health benefits, but also our vinegars contain Mother which helps boost good bacteria in the digestive system. These versatile vinegars are used as a finishing sauce, cocktail garnish and salad dressing. Made right here in the USA we locally sourced and produced guarding the highest standards of production and quality our line is now available in the UAE and Korea. For more information email: info@foodexport.org



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