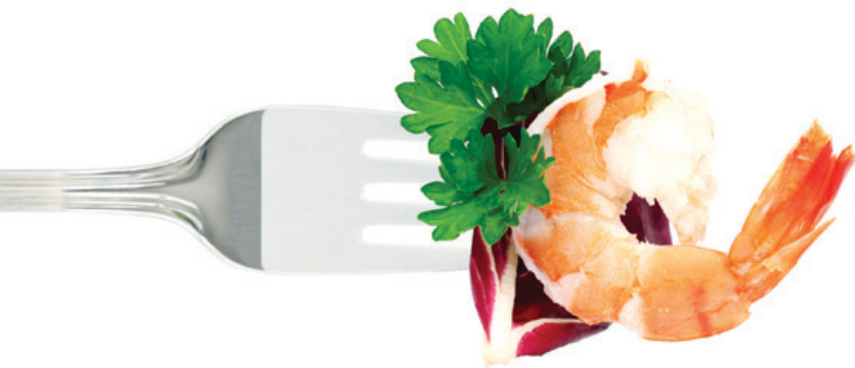


UNIVERSITY OF MINNESOTA

The Food Industry Center

2010–2011 ANNUAL REPORT





OUR MISSION

The Food Industry Center will develop leaders for tomorrow's food industry. Through research, educational programs, and industry collaboration, it is a leading source of knowledge on how food reaches consumers efficiently and contributes to safe and healthy lives.

About Us

The Food Industry Center (TFIC) was founded in January 1995 at the University of Minnesota as one of several Alfred P. Sloan Foundation Industry Studies Centers and the only one that studies the food industry. TFIC has an illustrious sixteen year history of conducting primary research on the food industry and offering forums on current industry topics and best practices. Originally established as The Retail Food Industry Center, the Center changed its name to The Food Industry Center in 2001 to accurately portray the breadth of food industry studies the Center conducts.

TFIC is a national collaboration of scholars made up of faculty, students, and industry leaders from across the nation and the world who address the issues of an efficient, ethical, healthy, and safe food system. The Center addresses cross-sector issues through developing and disseminating data and analysis focused on how food moves from farm to fork.

The Center is advised by three boards – a Board of Executives that provide their senior level strategic guidance, the Program Leadership Board – our industry working board whose members contribute their practical experience to our research and programs, and an Academic Leadership Board made up of faculty contributors from the College of Food, Agricultural and Natural Resource Sciences and the Carlson School of Management.

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A Note from the Director

Life is never dull in the food industry. This past year has been an interesting one for food producers and processors, for distributors and retailers, and for consumers. To name just a few key developments, we saw passage of major new legislation on food safety, a dramatic rise in food prices and growing concerns about food security around the world, the roll-out of a wide array of sustainability initiatives by food companies in all segments of the industry, and debates over tax policies of particular concern to the many family-owned businesses across the food system.

The Food Industry Center's (TFIC) mission is to be a source of knowledge and insight on the food industry and to develop leaders who will shape the industry's future. Our activities this past year included research and events on local food, efforts to develop meaningful indicators of food system sustainability and to make sense of the often confusing and conflicting sustainability standards, and continuing research on consumer confidence in the U.S. food supply. We also placed new emphasis on student programs. Through the efforts of Research Fellow Dennis Degeneffe and Associate Program Director Lisa Jore, we have established The Food Industry Center Student Affiliates program designed to strengthen ties between University of Minnesota students and companies in the food industry. We are excited about the news we have to share in this annual report.

This also has been a year of significant change within TFIC. I assumed the Directorship in July 2010 as our Founding Director Jean Kinsey prepared for her retirement from the University on August 31, 2010. Jean's contributions were monumental. Happily, she continues to be involved with Center activities when her busy travel schedule allows.

In early August 2010, Professor Tim Beatty joined TFIC as our new Associate Director. Prior to his move to Minnesota, Tim was on the economics faculty at the University of York in the UK. He has brought energy, insight, and expertise to our programs, and he has initiated exciting work with graduate students on food security and consumer behavior.

The past year also brought changes to our staff. Research Associate Koel Ghosh moved across campus to continue her research on food protection at the National Center for Food Protection and Defense. Research Fellow Dennis Degeneffe, who worked with our Program Leadership Board, chaired the Food Industry-University Coalition, and played a key role in the new student programs we initiated this year, retired from the University in June. Lisa Jore continues in her role as Associate Program Director, with new opportunities to apply her planning, communications, and program development skills.

Finally, as I announced in our Spring 2011 newsletter, I stepped down as Director at the end of June 2011. This will allow more time for my research program and for my duties as President of the Agricultural & Applied Economics Association. I am very happy that Professor Michael Boland, who recently joined the Applied Economics faculty at the University of Minnesota, is our new Director. Mike brings a wealth of industry experience, a deep dedication to students, and a seemingly unlimited supply of energy and ideas. I welcome him and look forward to working with him.



Robert P. King



Educating Future Leaders

Making a Case for Social Media

If you were a consultant to a mid-sized independent grocery chain, what kind of social media strategy would you offer the company? This question was put to a group of university students in a case study competition at the 2011 National Grocers Association Annual Convention. Each year, NGA organizes an internship program to assist at the convention, and this year, interns had the opportunity to participate in a case study competition to demonstrate their research, presentation, and social media savvy.



Students Annette Good, Duane McDowell, Anna Eggen and Andre Gordillo with Cindy Sorenson of Midwest Dairy.

As in past years, The Food Industry Center sent four students to the NGA Convention in Las Vegas, to learn more about the grocery business, the food system, and its career opportunities. But this year was different. Our students not only served as interns, they also became the teachers. University of Minnesota students Anna Eggen, Annette Gooch, Andre Gordillo, and Duane McDowell represented Minnesota in this year's activities and showcased their food marketing skills by preparing a thorough and insightful analysis of social media's role in the market place, its opportunities for the retail food industry, and giving recommendations on how to incorporate a social media strategy into an independent grocery chain's marketing plan.

About the Convention's focus on social media topics, Anna observed "...the topic of social media was brought up multiple times throughout the conference emphasizing the importance of our research and findings." And Duane noted "Participating in the presentation competition was fun and challenging, and seemed like a good way to make a strong impression on potential employers or advocates in the grocery business."

Such experiential learning opportunities offer a valuable resource for University of Minnesota students who pursue careers in the

food industry. As convention interns, students met with mentors and sat in on convention breakout sessions, learning about the food business with and from industry professionals. As a Food Marketing major, Annette commented

"The mentor program was the most insightful part of the convention because it gave me a great opportunity to observe real-life work situations...Participating in the meetings also increased my confidence in my position in the food industry because I was able to comprehend and understand the concepts being discussed during the meetings."

Reflecting on the time spent with his mentor at the Convention, Andre commented

"The time spent there on the floor was certainly an eye-opening experience, and we were able to network and meet many professionals with whom I shared similar interests. I left the trade show with not only a full stomach from all the free samples, but a bag full of business cards and company contact information!"

Many students express their surprise in the breadth of the industry. As a newcomer to the food industry, Duane said he "was given a very positive impression of the grocery business and all of the ancillary services that support it." Andre noted "the vast number of producers, wholesalers, manufacturers and retailers that have a hand in the industry surprised me." Annette said "I had (an) understanding of what the convention would be like but I didn't expect it to be as large and comprehensive as it was. The array of workshop topics, speakers, and number of vendors was very impressive and eye-opening." Meanwhile, Anna commented "this experience helped me gain a better understanding of the consumer end of the food industry supply chain. In doing so, I believe I



Students: Andre Gordillo, Anna Eggen, and Annette Gooch

Photo Credit: Duane McDowell

can bring a unique view to the production side creating a better consumer facing product.”

Growing up with parents in the food manufacturing business, Annette reflected on the relationships she observed at the convention:

“It was humbling to notice that all the attendees were either there to learn from other grocers or share successful tactics that their store implemented. Especially during a time of economic recovery, it

was noticeable that the independent grocers were willing to share their story and lend advice to others. Independent grocers are a special part of the industry because they implement a business culture that’s unique from the rest.”

Anna and Duane graduated in 2011 and moved into positions in the corporate sector. Andre and Annette will return to their studies in the fall. Their presentation is available, along with the others, on the NGA website located at <http://www.thengashow.com/education-schedule/university-case-competition>.

TEACHING THE ECONOMICS OF A FOOD RECALL

Working off the food recall case studies published by The Food Industry between 2008 and 2010, a collection of problem sets were created to help students understand the underpinning economics behind a food recall incident. Problem sets were created for both the Westland/Hallmark 2008 beef recall and the Natural Selection 2006 E.coli recall of fresh spinach. The Westland/Hallmark problem set is designed to provide instruction on the costs of procuring and distributing ground beef, while the Natural Selection problem set is designed to educate students on the prices and quantities of spinach sold around the recall time frame, the elasticity and cross-price elasticity of the spinach and its substituted products, and changes in consumer demand after a recall.

In order to better understand consumer response to these recall incidents, both problem sets supply sales data and guide students on how to use Excel to analyze recall-related sales data. Monthly scanner data was provided by the Nielsen Company for fresh

spinach, salad greens, and lettuce and is used to demonstrate changes in elasticity, cross-price elasticity, and consumer demand. Westland/Hallmark exercises instruct students on finding minimum costs for the blending and distribution of beef products using beef pricing information provided by the USDA Yelloosheet.

The problem sets are written for undergraduate and graduate students with previous economic coursework looking to apply their knowledge to food distribution and marketing issues. Visit The Food Industry Center’s case studies web page to access the problem sets.

THE PRACTICE OF DEVELOPING FUTURE LEADERS

As part of a TFIC initiative to expand student involvement with local food companies and increase student knowledge of the food industry, The Food Industry Center established the Student Affiliates program this past year to encourage students to grow their knowledge of the food system as they prepare for industry careers. The Student Affiliates program is open to University of Minnesota students interested in pursuing any field in the food industry from food marketing and finance to nutrition education or food science.

As an Affiliate, students will be considered for selection as a University of Minnesota intern at the NGA Annual Convention – an opportunity that gives students the chance to expand their professional networks through mentoring sessions, moderating

information sessions, and participating in a newly formed case study competition. Affiliates will also have the opportunity to participate in team research projects to work on projects such as the development of new food products for food manufacturers or designing merchandising plans for grocery stores. To round out their professional skills, students will also be encouraged to assist with the production of TFIC-hosted events or plan student-run events to bring industry speakers to campus.



Events & Outreach

One Day, Two Events, Three Opportunities to Learn

The popularity of local foods continues to grow in Minnesota, and on October 6th, its popularity offered an opportunity to gather industry professionals and students to meet and learn from one another. The morning workshop presented recent research on the local foods industry in a workshop titled “Lessons from Case Studies on Local Foods.” The afternoon session featured a presentation from Paul Hugunin from the Minnesota Grown Office, a statewide initiative to promote locally grown products. The day wrapped up with a speed networking session that introduced the food industry’s current leaders to its future leaders.



Paul Hugunin and Casey DeRosier discuss the Minnesota Grown program

Feeding off of last year’s Economic Research Service publication “Comparing the Structure, Size, and Performance of Local and Mainstream Food Supply Chains”, the workshop presentations stimulated lively discussion on issues presented in the research. Through audience questions, the workshop continued to debate what the definition of “local” is or should be. Knowledgeable workshop participants also raised issues of the impacts of then-pending food safety legislation on small farmers, the importance of entrepreneurship in local food systems, and the challenges of establishing a processing and distribution infrastructure that can operate efficiently while serving a small producer.

The workshop was sponsored by the Healthy Foods, Healthy Lives Institute; Minnesota Institute for Sustainable Agriculture and the USDA’s North Central Region (NCR) Sustainable Agriculture Research and Education (SARE) program, highlighting the University’s interdisciplinary approach to research and outreach on current food and sustainable agriculture initiatives. To read the full report and individual cases studies, visit the Center’s Local Foods Case Studies webpage.



Photo Credit: Nicole Holdorff

Local learning carried into the afternoon as guest speaker and University alumni Paul Hugunin, Program Manager of the Minnesota Department of Agriculture’s Minnesota Grown program, offered attendees an informative presentation on the variety and economic value of food and other natural products grown in Minnesota. Minnesota Grown intern and University of Minnesota student, Casey DeRosier, showcased her marketing efforts for the program in a video segment she produced for the Minnesota Grown program.

In the final session of the day, participants shared questions, experiences, and business cards in 10 minute networking sessions, mixing students and industry attendees. Students were particularly interested in learning about the various career paths of industry professionals, commenting that although their academic program prepared them for entry level positions, they were seeking more information on career planning. Happily the afternoon’s events paid off — over 80% of the participants, students and professionals, said they expanded their professional networks by attending the afternoon networking session.



Photo Credit: Darren Lochner

Students and industry professionals at the afternoon networking session.

Research



Calculating the Cost of a Hunger-Free Minnesota

In Minnesota, the pervasive problem of hunger is getting a community-wide intervention. The Hunger-Free Minnesota campaign describes its work as:

Hunger-Free Minnesota is a statewide initiative to fight hunger in our communities. It is the first statewide campaign of its kind in the country. It unites a coalition of business people, community leaders, government policy specialists, communities of faith, food banks, food shelves, aligned agencies and thousands of volunteers in a fight against the devastating and debilitating effects of hunger.

As part of the intervention, researchers at The Food Industry Center contributed an economic calculation of the price of hunger and the value of hunger relief in Minnesota, with its *Cost/Benefit Hunger Impact Study* published in September 2010. Charged with the task of quantifying the individual and societal impacts of hunger, Assistant Professor Elton Mykerezi, Professor Jean Kinsey, and graduate student Charlotte Tuttle identified adverse health conditions caused by hunger, then calculated the cost associated with the condition.

Impacts of hunger that the researchers studied, ranged from hungry children receiving poorer grades in school, more likely to have behavioral and mental health problems. Children and adults are more prone to poorer health, hospitalizations, iron deficiency and adults prone to obesity. Researchers estimated that hunger's impact

on overall health costs Minnesotans almost \$1 billion annually in direct medical costs. This figure does not include the related indirect costs of missed work, lower productivity while working, lower overall quality of life or non-hospitalization medical costs like headaches, stomachaches, and colds and flu, accounting for another \$161 million in hunger related costs. Psychological and social consequences of depression and anxiety add an additional \$172 million to these costs. When adding the health costs to costs related to poor educational performance, researchers conservatively estimated the cost of hunger in Minnesota in 2008 totaled \$1.62 billion. This amount breaks down to approximately \$800 per Minnesota household.

In looking at ways to alleviate hunger in Minnesota, researchers found that for every dollar invested by the state in the Supplemental Nutrition Assistance Program, the state received \$7.50 in federal government dollars. Federal dollars not only added to the food budgets of hungry Minnesotans, but were spent in the Minnesota economy generating \$13.50 in economic activity and up to \$2.74 in hunger-related cost savings.

More information on the Hunger-Free Minnesota campaign and the full version of the *Cost/Benefit Hunger Impact Study* are available online at <http://hungerfreemn.org>

Measuring Food Sentiment

Building on their work of consumer confidence in the U.S. food supply, researchers Dennis Degeneffe, Wes Harrison, and Jean Kinsey continued collecting more data on food incidents and consumer confidence this past year as part of the Continuous Food Safety/Defense Tracker Project (CFST). The data, collected through November 2010, reflects the August 2010 nationwide egg recall and continued consumer weariness of seafood from the Gulf of Mexico after the Deepwater Horizon oil spill. As late as January 2011, major news outlets continued to use findings from the Gulf oil spill and seafood safety survey to report on consumers' attitudes toward Gulf seafood safety.

Researchers can find the plotted data from the Tracker Project on The Food Industry Center website. Data was interpreted by creating "Consumer Confidence" and "Perceived Preparedness" indices and

also offers consumer sentiment from the Gulf Oil Spill and the risks it posed to seafood safety.

CFST research is a joint project between The Food Industry Center and the Louisiana State University AgCenter with funding from the National Center for Food Protection and Defense. The study's Perceived Preparedness Index (PPI) measures the change in consumers' belief about how prepared government and private companies are to respond to food safety incidents. The study's Consumer Confidence Index (CCI) measures the change in consumers' confidence in the safety of the U.S. food system. When the indexes were initiated in May 2008, only 30 percent of consumers indicated they believed the food supply was safer than one year ago.

My educated guess is it's turned positive by about 20 percent since hitting bottom," said Dennis Degeneffe, who compiles the Food Industry Safety Tracking study at the University of Minnesota. "But we still have a long way to go to recovery. The around-the-clock media coverage has stopped. So the healing process has begun."

"Eight weeks after oil stopped gushing, people are still wary of gulf seafood"
Mark Albright, Tom Scherberger and Jim Webster, St. Petersburg Times
September 17, 2010

Sustainability, the Food System, and the Consumer

Consumers, food companies, environmental and consumer advocates, and governments are all giving increased attention to the economic, environmental, and social sustainability of the food system. Efforts to develop standards that measure and guide progress toward food system sustainability have proliferated in recent years in the U.S. and around the world.

Over the past year, TFIC Director Rob King partnered with colleagues in the Netherlands on a project titled Voedselbalan, which translates to English as “Food Monitor.” The project, commissioned by the Dutch government, was led by Gé Backus, Manager of the Consumer & Behavioral research area at the Dutch Agricultural Economics Institute. The overall objective was to better understand how consumers think and act about sustainability in the food system. Project activities included surveys of 3,700 consumers and 200 food companies as well as face-to-face interviews with 33 food company CEOs. As part of the project, King and Backus collaborated on a white paper discussing “The Role of Standards in Promoting Food System Sustainability.” Originally published in Dutch, an English version of the paper is available on the TFIC web site (foodindustrycenter.umn.edu/Research).

The white paper reviews the conceptual foundations for sustainability standards designed around three purposes: (1) assessment and monitoring, (2) informing and influencing, and (3) regulating and controlling. These three purposes are not perfectly distinct, nor do they necessarily encompass all points of view in the sustainability standards debate, but clarifying the differences among them can reduce confusion in the discussion of sustainability standards. King and Backus go on to describe the basic structure of a simple food system sustainability scorecard that can be implemented by retailers to address each of these three purposes.

Key findings from the Food Monitor Project, presented by Backus at the annual meeting of the Agricultural & Applied Economics Association in July 2011, noted:

- There is clear momentum for sustainability initiatives among Dutch companies, with retailers leading the way.
- Dutch consumers are concerned about sustainability, but price, taste, convenience, and health are key drivers of purchase decisions.
- All firms indicate they will take major steps on sustainability in the next five years. The current emphasis is on back-office processes with particular emphasis on energy conservation.



TFIC in the News

“The University of Minnesota’s Food Industry Center has been polling consumer confidence weekly. In last week’s survey 44 percent of consumers said they would eat only seafood they know did not come from the gulf and an additional 31 percent said they would eat less seafood regardless of its source.”

“Spillover at the seafood counter”
Dianna Marder, *Philadelphia Inquirer*
July 22, 2010

“‘One of the issues is going to be how can we really scale it up so more people can get access,’ says Rob King, professor of applied economics at the University and first author on the report.”

-*Rob King discussing how supply chains may address growing demand for local food products.*
“Food miles, Kowalski’s and that steak on your plate”
Dave Peters, *MPR News*
July 19, 2010

“Robert King, director of The Food Industry Center at the University of Minnesota, said farmers markets often implement rules among their members about where produce must be grown and who can sell what. These rules help keep consumers informed about the origins of their food, he said.”

“Imported produce ban irks Lake Elmo farmers”
Emma L. Carew, *Star Tribune*
August 14, 2010

Co-author Jean Kinsey estimates that Minnesotans pay more than \$1.6 billion every year in medical and educational costs... “It’s costing not only them, but us, a lot of money every year,” Kinsey said. “It’s a solvable problem. With the help of a lot of individuals, corporations and food companies, this could be taken care of.”

- *Jean Kinsey in response to research findings quantifying the cost of hunger in Minnesota.*
“New campaign aims to end hunger in Minnesota”
Laura Yuen, *Minnesota Public Radio*
September 27, 2010

“Back in the early 20th century, people were going into stores where the goods were behind counters, and over time, smaller stores got bigger. Now we have a proliferation of formats unlike anything we’ve seen before. And customers are being pulled in all these different directions.”

-*TFIC Research Affiliate and Professor, Ben Senauer, responding to the changing American grocery shopping landscape.*
“Turbulence in grocery industry reflects shifts in food culture”
Patrick May, *The Mercury News*
October 10, 2010

“I’m struck by the need to reduce hunger, increase food production, increase sustainability and reduce transportation to deliver food,” said Kinsey, ... “Richer people want richer foods... richer food means more animal protein. They aren’t satisfied living on cereal anymore.”

-*Comments from Jean Kinsey’s at the 2010 D.W. Brooks Lecture at the University of Georgia.*
J. Faith Peppers, *Southern Farmer*
October 14, 2010

However, in a poll this summer by the University of Minnesota’s Food Industry Center and Louisiana State University’s Agricultural Center, 38% of respondents said that as a result of the oil spill they would eat either less Gulf seafood or none at all.

- *Quoting the Consumer Food Safety/Defense Food Tracker Survey*
“Oysters Lose Their Allure”
Jeffrey Ball, *The Wall Street Journal*
November 6, 2010



“However, Americans and U.S. companies are still working hard to end hunger despite this belief, and their commitment will help solve the problem.”

— Jean Kinsey in response to *American sentiment that hunger will not be solved in the next 20 years.*

“More Than One in Four Americans Say They Have Had to Choose Between Paying Bills and Feeding Family”

The Financial

November 16, 2010

“Dennis Degeneffe a research fellow at The Food Industry Center at the University of Minnesota said that while the results aren’t surprising, they do show that ‘consumers are connecting the event to food safety’ ... In response to results from the Louisiana Seafood survey where 54 percent of Americans have changed their seafood consumption as a result of the Gulf of Mexico Oil spill and 31 percent said they would eat less seafood no matter the origin.”

“Gulf Spill Fix Part 2: Consumer Confidence”

Malcolm Wittenberg, *The Huffington Post*

November 18, 2010

“Researching how to handle a smaller scale situation, such as a salmonella outbreak, helps the Center create models and simulations to study to prepare for a national or global attack... There are many ways an attack to a farm could reach all the way to the consumer, Degeneffe said. Examples could include the contamination of bulk storage tanks, food transportation systems or even stores.”

“U helps prepare for food attacks”

Ashley Bray, *Minnesota Daily*

December 13, 2010

“‘Still, you don’t want to lose nearly 25 percent of the market for your product,’ said Dennis Degeneffe, a research fellow at the University of Minnesota’s Food Industry Center in Minnesota, who worked on the report with Wes Harrison, a professor in LSU’s Department of Agricultural Economics.”

“Survey Measures Post-Oil Spill Seafood Attitudes”

Kevin McGill; *Associated Press, ABC News, Yahoo! News, New Orleans City Business, The Huffington Post*

January 31, 2011

“Generally, consumers try to make small, less painful changes to their shopping habits when food prices go up, said Jean Kinsey, professor emeritus at The Food Industry Center at the University of Minnesota. ‘We still have to eat.’ ... However, she does worry that as prices climb, people will move away from fresher, healthier options to cheaper, processed foods. ‘The competition for processed foods is fierce, so they’re often on sale,’ she said.”

“The calm before the storm for food prices?”

John Ewoldt, *Star Tribune*

February 10, 2011

“Price is an important signal to farmers [about what and how much to plant],” she said.

Kinsey, the former director of the University of Minnesota’s Food Industry Center, said governments need to develop safety net programs with food reserves that don’t disrupt markets the way hoarding does. However, growing demand, coupled with climate change, may warrant other extraordinary measures... Financial incentives that come from an emphasis on renewable energy drive farmers to grow corn for ethanol or other biofuels and to reduce acreage of other commodities, she said.

A month ago, Kinsey wrote on the Food Industry Center’s blog that the food crisis could force more countries to accept genetically modified food, a move considered environmental heresy in some parts of the world ... “We may have to spread the growing areas of commodities into places they haven’t grown before,” Kinsey said in an interview. “We may need to engineer seeds to be more productive and to grow in what we now think of as impossible conditions.”

“Land O’Lakes makes case for more food”

Jim Spencer, *Star Tribune*

March 7, 2011

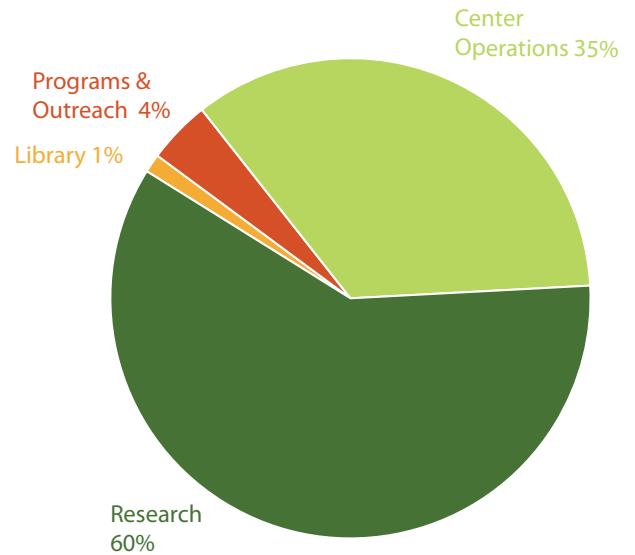
TFIC Financial Report

FY11 Revenue & Expense Sheet

REVENUE	
FY10 Sponsorship & Contributions	110,790
Restricted Revenue	190,696
Investment Gain (Loss)	1,506
External Sales	45
TOTAL REVENUE	303,037

EXPENSES	
Unrestricted Expenditures	121,106
Restricted Expenditures	190,696
Total Expenditures	311,802
TFIC FOUNDATION RESERVES	93,681

FY11 Expenses



Publications

Natural Selection 2006 *E. coli* Recall of Fresh Spinach: A Case Study by The Food Industry Center Problem Set
Kinsey, Jean; Seltzer, Jon; and Xudon Ma. The Food Industry Center, University of Minnesota, July 2010.

Westland/Hallmark 2008 Beef Recall: A Case Study by The Food Industry Center Problem Set
Kinsey, Jean; Seltzer, Jon; and Nina Cotelupenco. The Food Industry Center, University of Minnesota, July 2011.

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Miguel Gomez, Assistant Professor of Applied Economics and Management, Cornell University

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Wes Harrison, Professor of Agricultural Economics, Louisiana State University

Healthy Foods, Healthy Lives Institute; University of Minnesota

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Duane McDowell

Dustin Vanasse

Yuki Wang

The Food Industry Center would like to extend a special THANK YOU to our Sponsoring Member companies and organizations for their financial support during the year. We would also like to extend a special Thank You to our Board of Executives and Board Chair Steve Aanenson, for their leadership and support of the Center this past year.

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Program Leadership Board

TFIC would like to extend a sincere THANK YOU to members of our Program Leadership Board. Members contribute their practical knowledge of the food industry to our research and events and provide valued industry insight to our work.

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