



U.S. SPECIALTY FOOD INDUSTRY

PREPARED BY
THE ITALY-AMERICA CHAMBER OF COMMERCE
AND SAINT JOSEPH'S UNIVERSITY
FOR:



Table of contents

1. Size of the market and its evolution over the past 5-10 years and forecast for the next 5-10 years
 - a. Specialty foods in US
 - i. Figure 1 Total Specialty Food Sales in US \$
 - ii. Figure 2 Retail Sales Growth of Food in the United States
 - iii. Figure 3 Forecasted specialty foods
 - b. Italian Imports
 - i. Figure 4 Italian Food Imports (Lbs.)
 - ii. Figure 5 Italian Food Imports (\$).
 - iii. Figure 6 Italian Cheese Imports
 - iv. Figure 7 Forecasted Italian Cheese imports
2. Laws and regulations
3. Market Segmentation by geographical area/distribution channel/retail channel etc.
 - i. Figure 8 Specialty Food Sales by Channel
 - ii. Figure 9 Consumers' Purchase by Store Type of Specialty Foods In 2019
 - iii. Figure 10 Distribution Of Specialty Food By Generation
 - v. Figure 11 Interest In Cuisines By Generation
 - vi. Figure 12 Change In Deli Sales Over Time
 - vii. Figure 13 Change In Deli Sales During The Coronavirus Pandemic
 - viii. Figure 14. Sales Growth of Fresh Deli Meat



ix. Figure 15 The Cities W/ The Largest % Italian American Residents

x. Figure 16 The Cities with The Largest \$ To Italian Americans

4. Supply Chain Structure and Major Issues

i. Figure 17 In Trucking Prices

ii. Figure 18 Natural and Organic Food Sales

iii. Figure 19 Forecasted Natural and Organic Food Sales

vi. Figure 20 Other Pant Based Dairy Ales 2929

vii. Figure 21 Retail Sales Growth of Plant/Meat-Based March & April

5. Major trends:

i. Figure 22 Global Gluten Free Food Sales

ii. Figure 23 Global Gluten CSGR For Gluten Free Foods

iii. Figure 24 Dieting Rules Followed

6. Evolution of the consumer

vi. Figure 25 The Modern family

vii. Figure 26 Growth of Single Person HHs

viii. Figure 27 Population of Minorities in US

7. Promotion and Marketing (evolution, best practices, digital marketing) with a focus

i. Figure 28 Grocerant

8. Certifications (PDO, IGP)

9. Retail environment

Appendix A *Brokers and Supermarkets*

Acme, BJ's Wholesale Group, Di Bruno's, Giant Eagle, Key Foods, King's, Sprouts Famers Markets, Wakefern Group (Dearborn Market, Fairway, Gourmet Garage, Pricerite, Shoprite, The Fresh Grocer), Wegman's, Weiss Markets



Appendix B *Marketing and Sales Agencies*

Acosta Sales and Marketing, Catalina Marketing Group, ESM
Ferolie, Key Impact Sales and Marketing,

Appendix C *Brokers, Distributors and Importers:*

C&S Wholesale Grocers, Gellert Group, Procacci Brothers,

Appendix D Faculty and Accademia Appendix D

Size of the market and its evolution over the past 5-10 years

Specialty Foods



A specialty food is a food that is typically considered as a "unique and high-value food item made in small quantities from high-quality ingredients". Consumers typically pay higher prices for specialty foods, and may perceive them as having various benefits compared to non-specialty foods.

Compared to staple foods, specialty foods may have higher prices due to more expensive ingredients and labor. Some food stores specialize in or predominantly purvey specialty foods. The specialty food market has been consistently growing over time as can be seen in Figure 1. This represents all specialty foods, not just those from Italy. One can see in Figure 2 that specialty foods have been growing much faster than the food sales in general, 8.9% versus 3% for all foods. Using a traditional forecasting method, the projected sales for the years 2021 to 2026 is shown in Figure 3. One can see an average increase of 9% thus no change is expected in the growth of specialty foods.



Figure 1

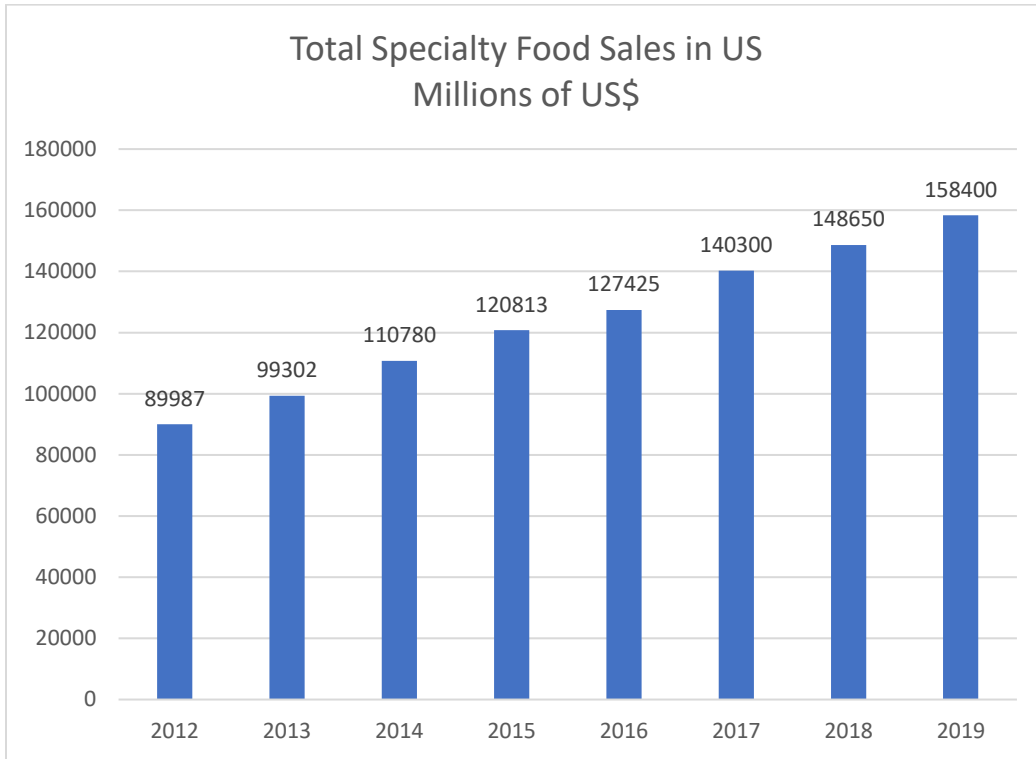
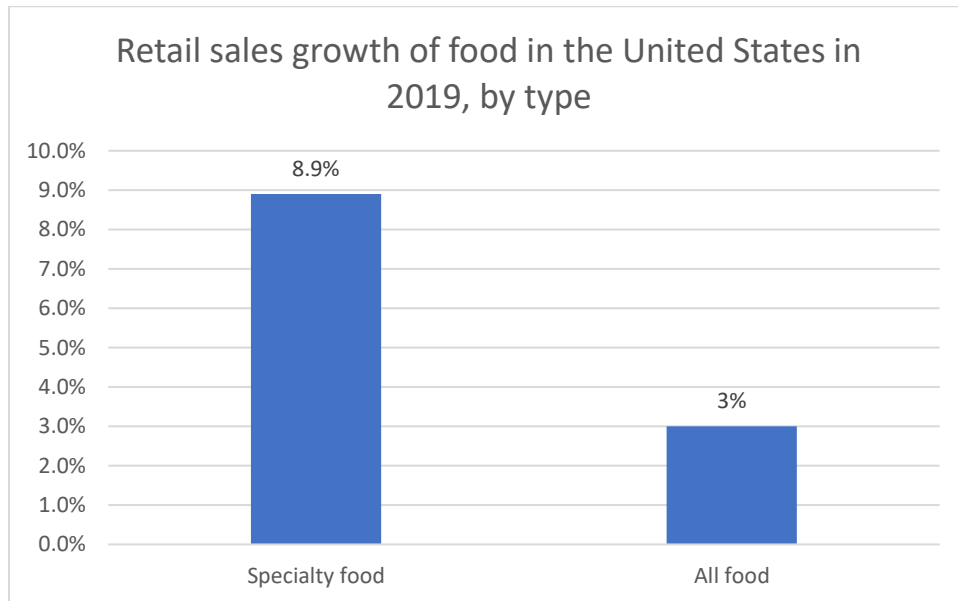
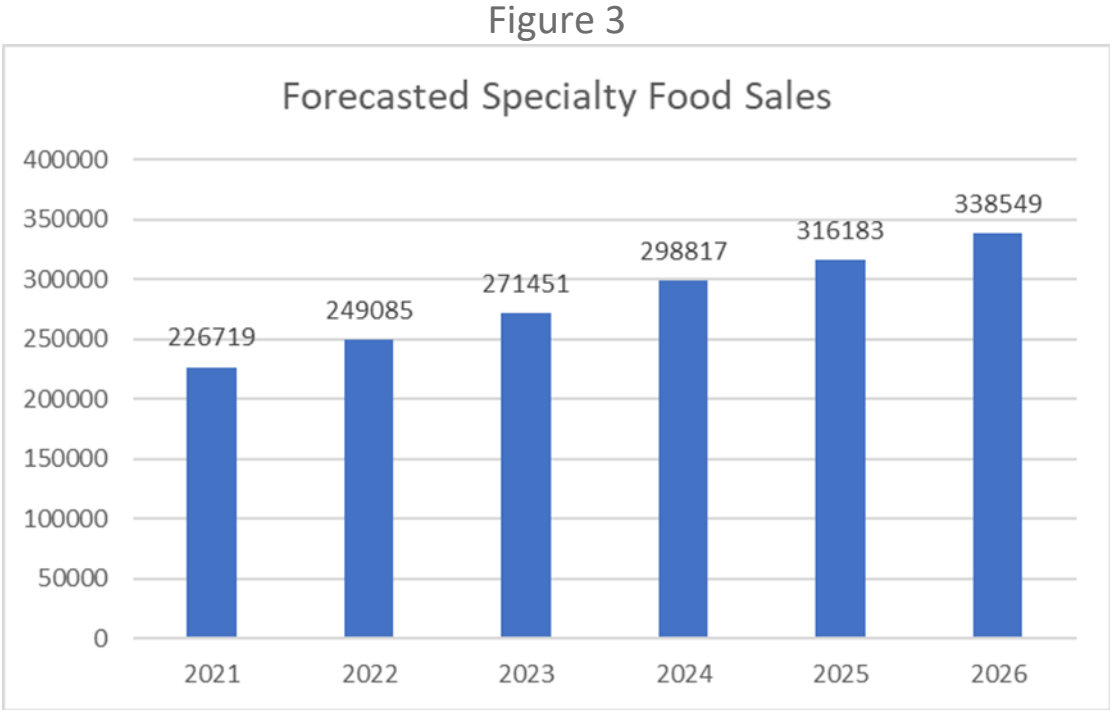


Figure 2





The forecasted growth of the specialty food market in the US is shown in Figure 3



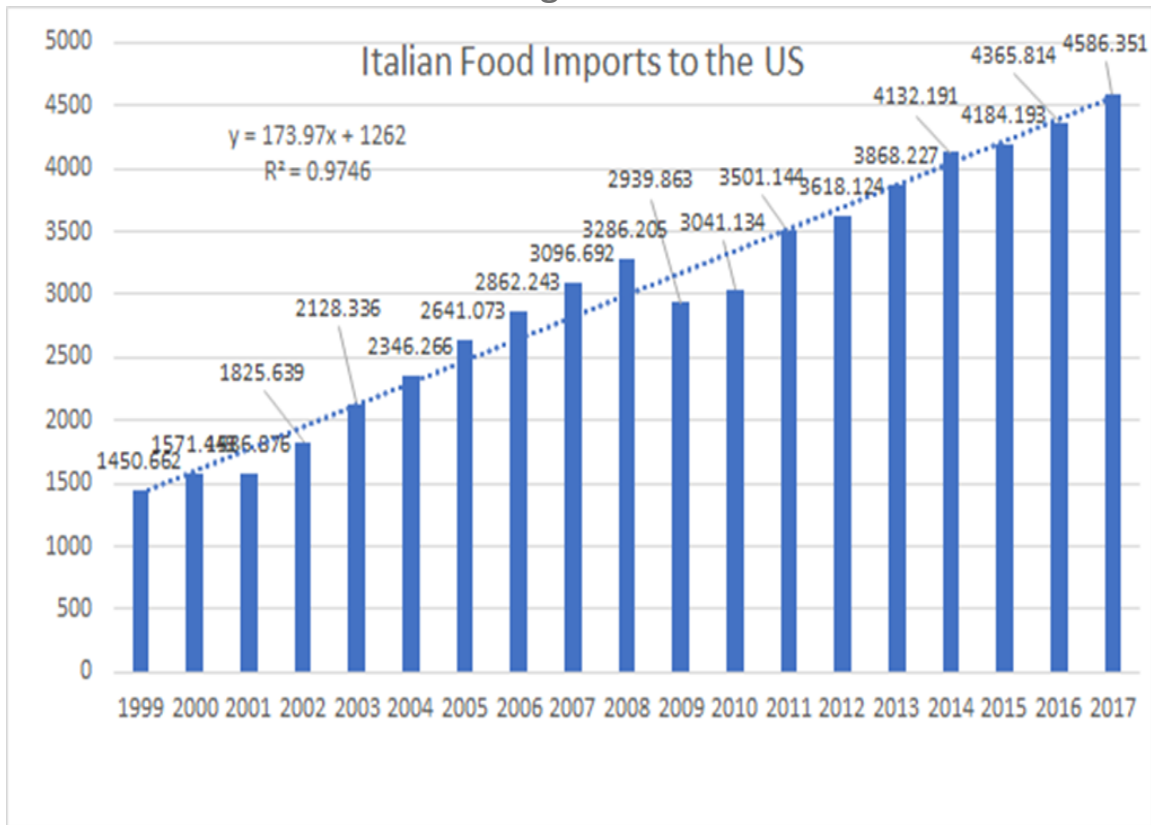
Italian Food Imports



One can see in Figure 4 the sales and growth of Italian food imports to the US. This represents all foods and not just specialty foods. The average growth rate is 7%. The Italian imported foods growth rate is slightly less than overall imported food to the US (8.9% in figure 2.) Figure 5 shows the amount of Italian cheese that is produced in the US. Table 5 shows the sales value of imported Italian Cheese.



Figure 4



Italian Imported Cheese

Figure 5 shows the amount of Italian cheese produced in the USA and Figure 6 shows the sales value of imported Italian cheese, over the same period of time. About 5% to 7% of all Italian food imports are from cheese. And imported Italian cheese is about 6% of the Italian style cheese sold in the USA (in 2014 as it is most recent data in both figures). While the raw number re earlier than would like they are the most recent numbers.

Figure 5

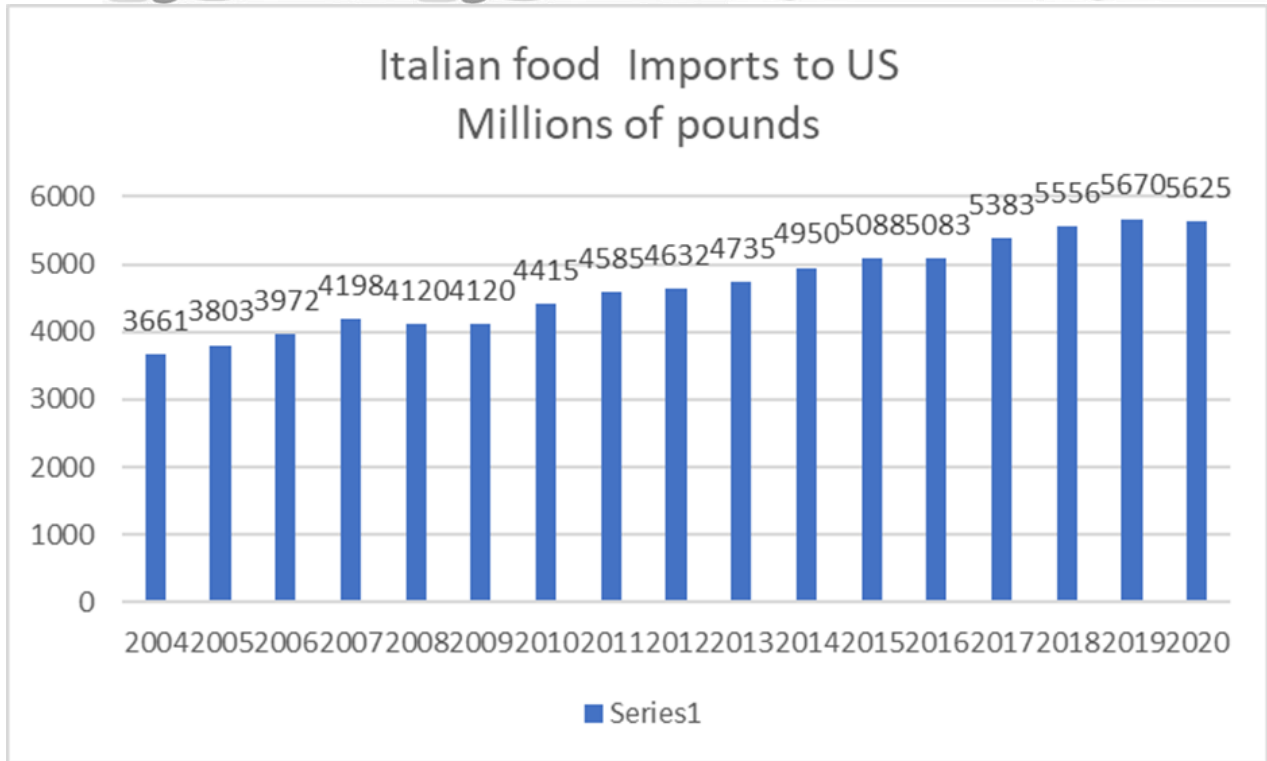
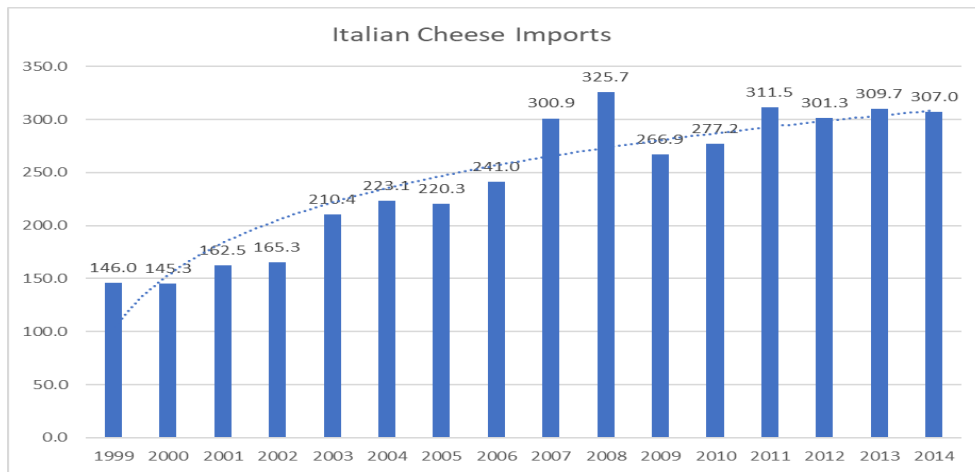


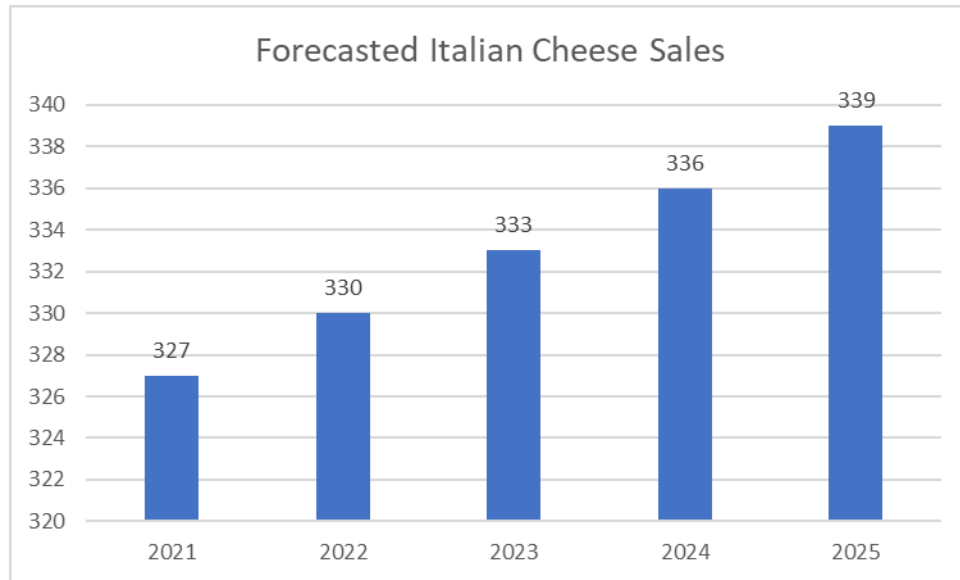
Figure 6



One can see in Figure 6 that Italian cheese imports to the US has been growing over the past years. There has been a drop off beginning in 2015. Thus, the traditional linear projection is far less accurate than other techniques. Using an exponential forecasting model, it appears

that the forecasts are slightly optimistic. See Figure 7. Additionally, using this model it is best to only forecast a few periods out.

Figure 7



Distribution

Figure 8 shows the distribution of Specialty foods by brick and mortar versus Food service.

Figure 8

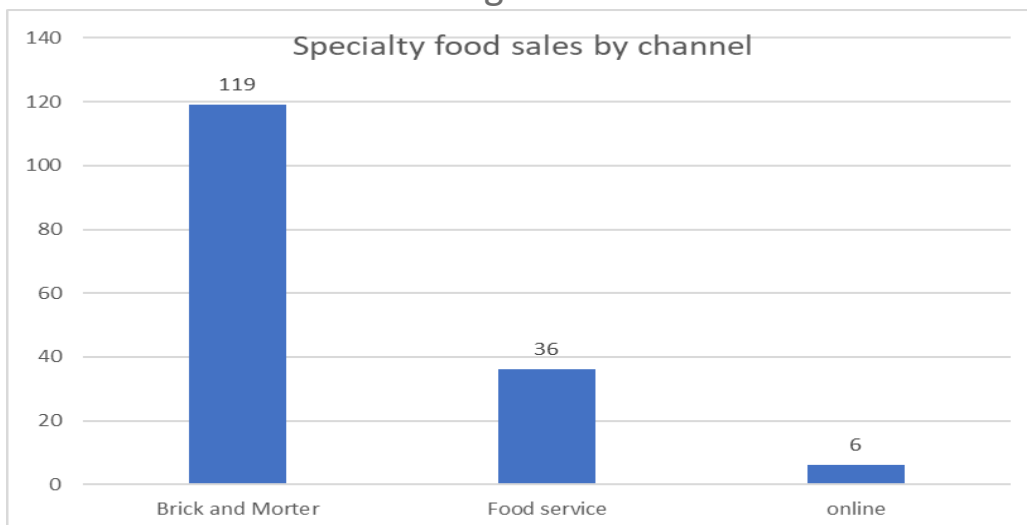
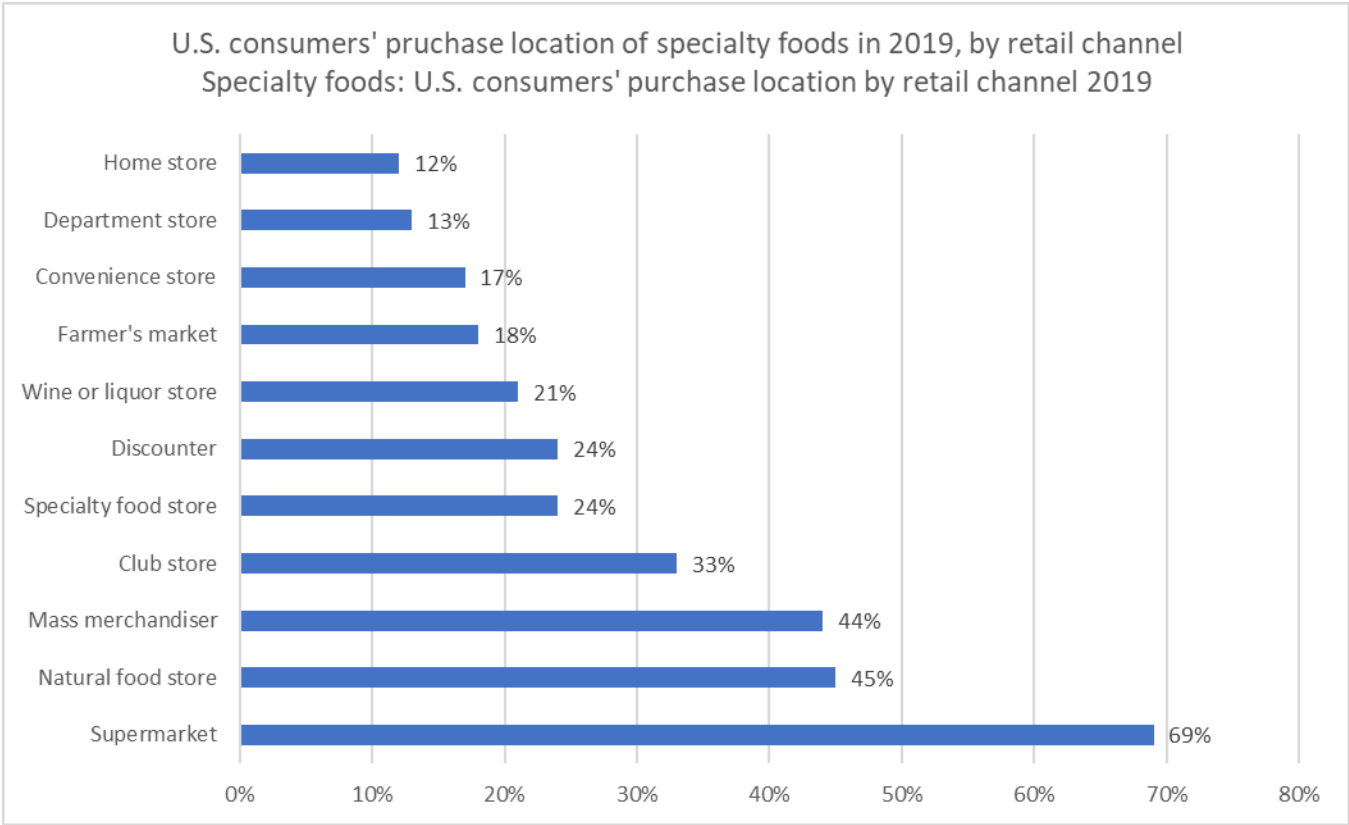




Figure 9 shown below shows the distribution by channel. One can see that supermarkets are the largest channel for specialty foods, with almost 70% of all specialty foods sold via Supermarkets. What may be surprising is that only 24% of purchases are made in specialty stores.

Figure 9



Brick-and-mortar gourmet food retailers operate at a 30 to 70% gross margin. Margins for higher value items, such as a premium Spanish Iberico ham (upwards of \$500 per piece), hover at around 30%. Lower value items, such as gourmet preserves (\$10 to \$30) can have margins up to 70% according to Jose Maria Pertusa.

There is good news and bad news in Figure 10 and Figure 11. Figure 10 shows that there is a high consumption rate of specialty foods in the

younger generations while Figure 11 below shows the preference by generation for various cuisines or ethnic foods. It is important to note that Italian is only preferred among the oldest age groups.

Figure 10

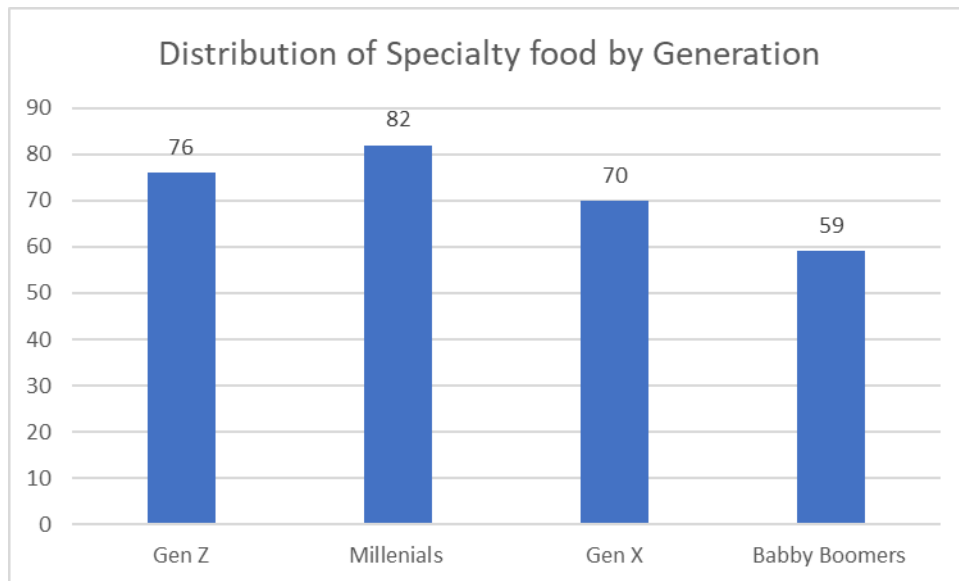
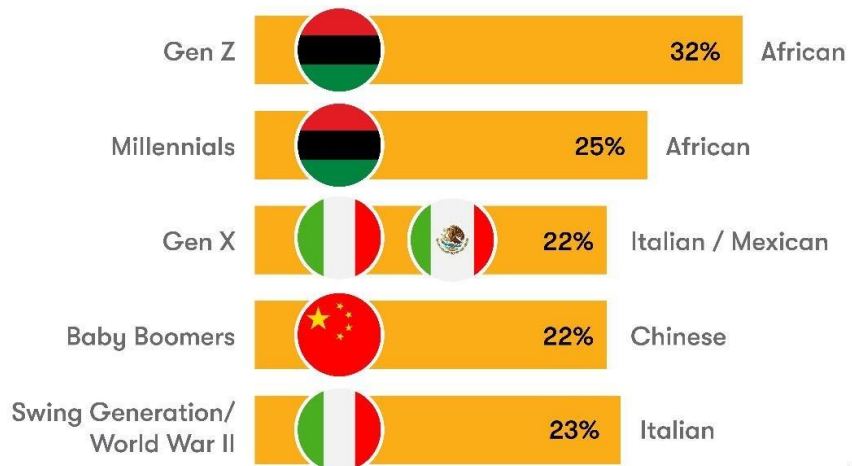


Figure 11

Interest in Cuisine Types Among Generations



Source: Lightspeed/Mintel

Deli sales



Since a significant amount of specialty food is sold through the deli, it is important to look at that function. Figure 12 shows the Deli sales pre-COVID and growth has been substantial. One can see in Figure 13 that deli sales took a big hit during COVID but now Deli cheese seems to be stabilized at about 18%.

Figure 12

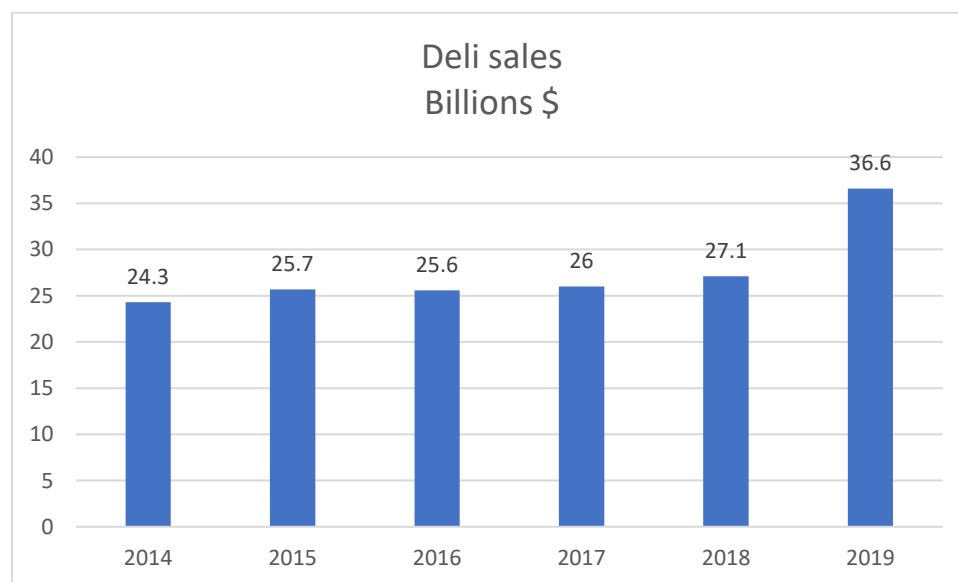




Figure 13

Change in deli department sales during the coronavirus pandemic

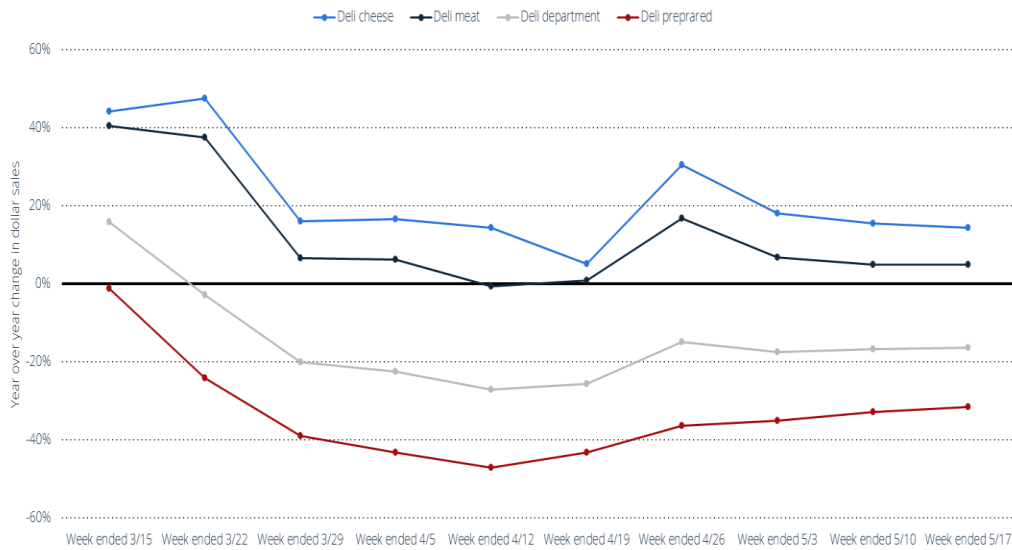
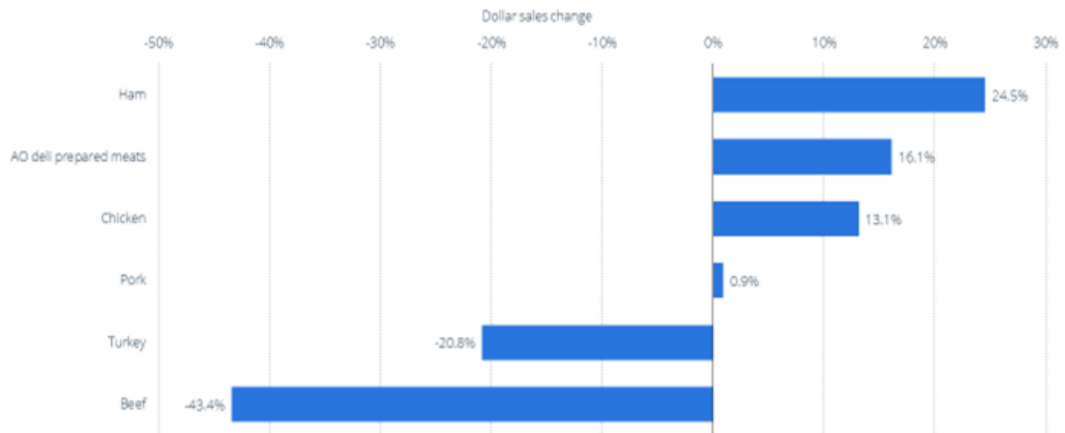


Figure 14 shows the changes in Deli sales by category in 2020. Note that ham has the highest increase in Deli sales

Figure 14

Sales growth of fresh deli meat in the United States in 2020, by type

Sales growth of fresh deli meat in the U.S. 2020, by type



Laws and regulations



The laws on dairy and dairy imports are very complex and vary by the specific product. One could not hope to cover all the issues necessary to import dairy and/or meat products. Dairy products such as milk, cream, ice cream, butter and many cheese products are subject to trade quota restrictions. The Foreign Agricultural Service of the U.S. Department of Agriculture uses import licensing to administer the tariff-rate quota system for U.S. imports. For dairy products a license is generally required to import at the low-tier rate. License eligibility is governed by a complex set of requirements. The low-tariff rate applies to imports up to a specific quantity.

Dairy products are also regulated by the Animal and Plant Health Inspection Service and require permits for import depending on the animal disease status of the region/country of origin. you will that your importer or brokerage house will have the most up to date regulations. for example, the U.S. Food Imports, a specialty company, will obtain necessary permits from USDA for importing dairy products for our customers.

Market Segmentation by Geographic Area/ Channel of Distribution /Retail Channel



Regional distribution

Italian food is one of the most popular ethnic foods in America. In fact, it's so popular that Italian food authorities have become concerned with what they call "Italian sounding" or "fake Italian food products." According to one study, authentic Italian food -- that's food imported from Italy -- accounts for only about one-third of Italian food purchased



in the United States. The remainder is foods that have Italian names, but are not authentic Italian products.

Authentic Italian food products are available at specialty food stores in the United States --most notably in Italian food markets in cities with large populations of Italian Americans. Italian food producers say that Italy's high standards, the importance of freshness and the cost and time of exporting have limited authentic Italian food products in the American market. However, the Internet has narrowed the gap, as more Italian products become available online.

So far, the twenty-first century has brought more attention to frittata, timballo, panini, insalata Caprese, burrata, arancini, homemade specialty pastas, flavored balsamic vinegars and oils, artisan breads and cheeses and, although not a food, but food related -- the barista. This is based on Janice Therese Mancuso is the author of *Con Amore*, a culinary novel; and founder of *Thirty-One Days of Italians*, an educational program to promote Italian and Italian American history, culture, and heritage. For more information, However, the geographic distribution of Italian food is almost ubiquitous across the US. It is higher in more dense populations and higher in major cities with higher Italian populations and those who travel more frequently. The cities with the largest percentage of Italian American residents are shown in Figure 15 and the states with largest number of Italian American population is in Figure 16.

Figure 15

The Cities with The Largest Percentage Italian American Residents

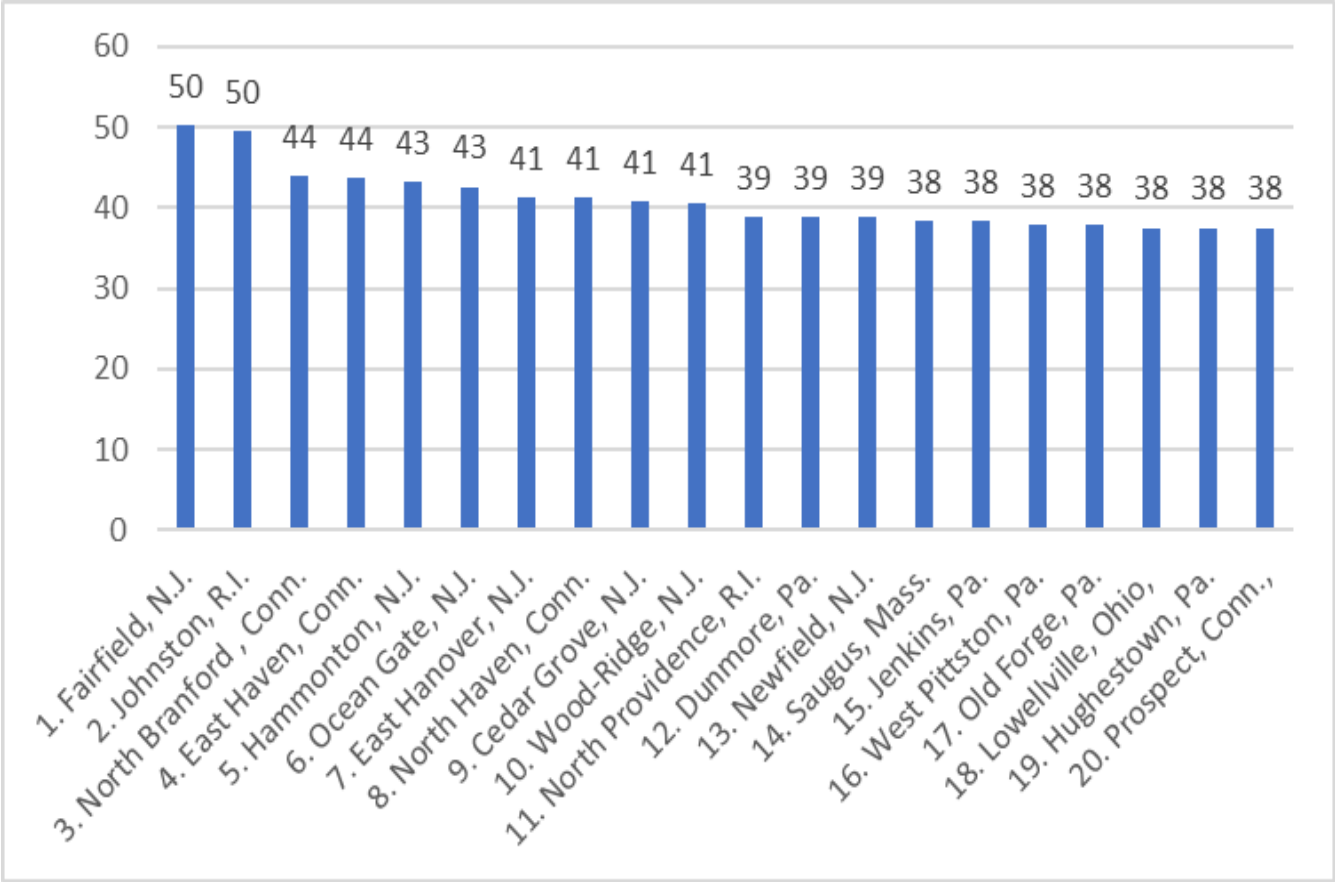
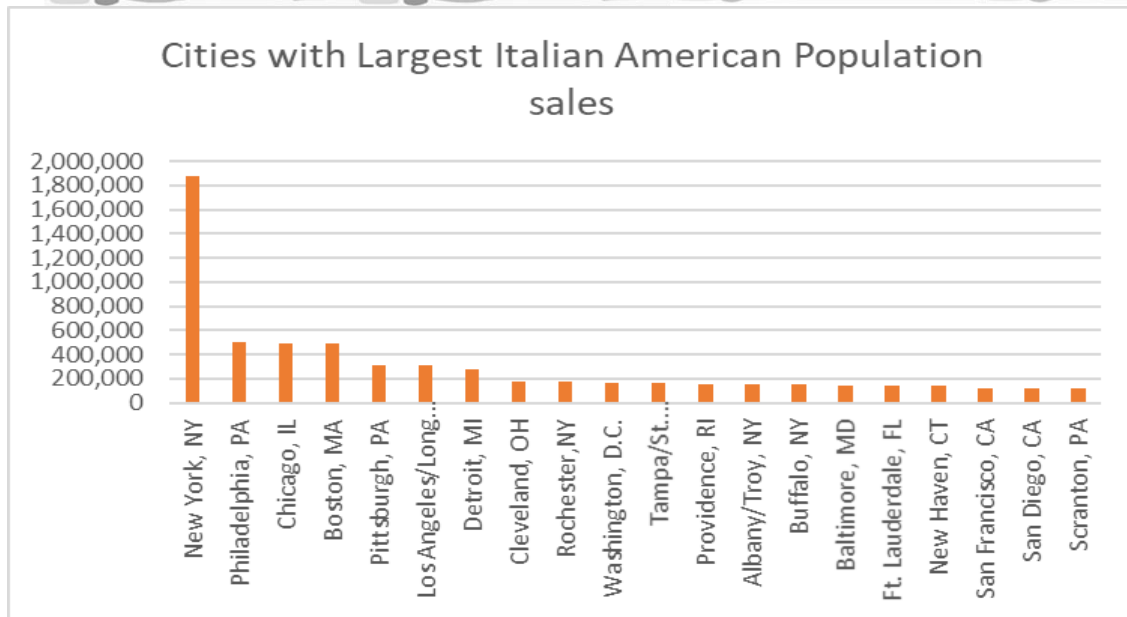


Figure 16



Supply Chain

There are two sides to the supply chain topic. The first is the “traditional” issues of distribution maintenance and the second is how things have changed during and after Covid.

The top ten persistent issues ranked in order of frequency of occurrence are:

1. Inventory Management and Planning
2. Demand Management and Forecasting
3. Supply Chain Network Optimization
4. Supply Chain Segmentation
5. Training and Development
6. Supply Chain Risk Management
7. Sales and Operations Planning
8. Performance Improvements in Warehouses and RDC's
9. Material Purchase Price Reductions
10. Green Supply Chains



There are no doubt issues that every food company is dealing with and will not be discussed in detail here. However, there are some important issues related to covid.

A supply chain is only as strong as its weakest link, so the saying goes. When it comes to the current state of the global supply chain, weakness is everywhere. Massive dislocations are present in the container market, shipping routes, ports, air cargo, trucking lines, railways and even warehouses. The result has created shortages of key manufacturing components, order backlogs, delivery delays and a spike in transportation costs and consumer prices. Unless the situation is resolved soon, the consequences for the global economy may be dire.

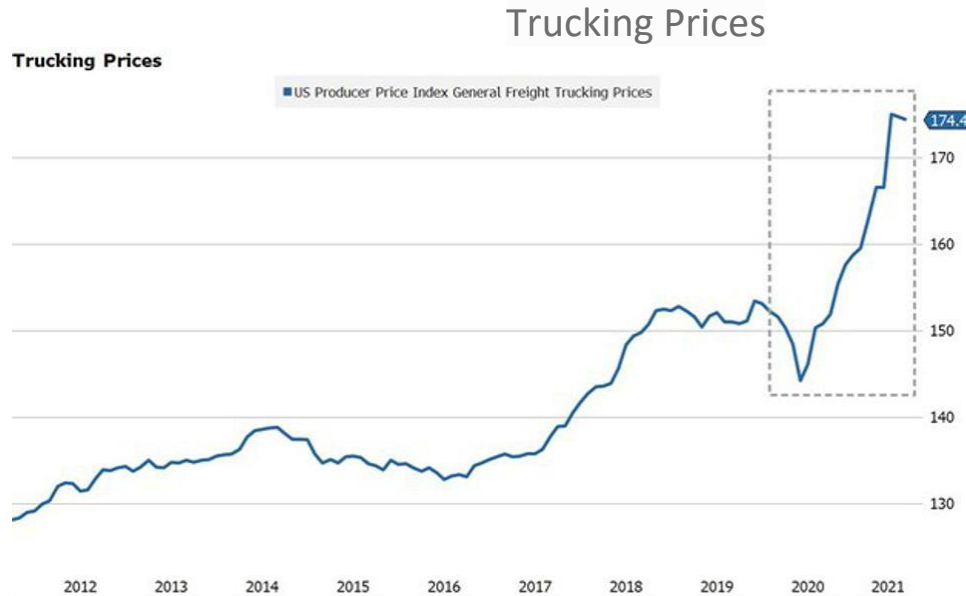
.By late 2020, real cracks in the supply chain started to emerge. From a logistics perspective, restarting the manufacturing machine after the lockdown turned out to be quite difficult. The complex system that moves raw materials and finished products around the globe requires predictability and precision. Both had been lost. As the holiday season approaches, the logistics industry is bracing for another jump in demand that could further cripple the supply chain. Every link in the chain needs to operate effectively to restore order in the system, yet each component has its own unique challenges to overcome.

Trucking is the primary source of container transport once the cargo is unloaded at a port. A shortage of drivers across the country means much of the container volume sits idle at capacity-constrained facilities. Frustration with employment prospects, safety concerns, expanded unemployment benefits and having kids at home have contributed to drivers leaving the industry.

Record-high shipping rates for some routes are impacting U.S. exports. Exporters say shipping lines are refusing to send boxes inland to pick up their cargo because they are trying to get empty containers back to factories in Asia as quickly as possible. Figure 18 shows the steep increase in trucking costs




Figure 17



These issues are beyond any Italian specialty food processor to fix. However, they must be aware of them and try to build into the strategy that distribution will not be the same as before.

All this is exacerbated by consumer demand. Consumers recognizing the supply chain problem are “stocking up.” This situation has made the past demand data not really useful in demand planning. If the coronavirus pandemic again forces public lockdowns, 53% of American consumers say they will stockpile groceries... according to a survey by CPG sales and marketing firm Acosta. Of shoppers polled, 38% said they stocked up on groceries at the start of the COVID-19 crisis and would do so again if another shutdown occurs. That scenario also would spur another 15% of respondents to build up their stores of groceries, even though they didn’t stockpile at the beginning of the pandemic.

Near term relief for the global supply chain disruption is not around the corner. As long as demand holds up through the holiday shopping



season, COVID outbreaks continue to shut shipping hubs around the world, and extreme weather batters individual links in the chain, expect the disruption to persist.

Major Food Trends



Organic and Natural

“The natural and organic food and beverage market is supported to some degree by over half of US adult consumers, and this is likely to remain steady in the years ahead. The health associations of natural and organic foods will make them more important than ever during a global health pandemic, as many adults seek ways to support overall wellness during uncertain times. Still, the economic downturn may cause fringe users who buy organic only occasionally or only in certain categories to switch to conventional products. More affordable private label natural and organic options will appeal to engaged users looking to save money.”

Adults aged 25-44 are the most likely to buy natural and organic products, and parents show significantly higher use than non-parents. However, brands should consider the health needs of the growing senior population in order to cast a wider net. Among non-organic shoppers, 56% feel organic products are not worth the higher price.



42% of all shoppers would buy more natural and organic foods if they were more affordable.

The COVID-19 pandemic has brought new attention to working conditions across the food industry. Organics can appeal to consumers by emphasizing the ways they are supporting workers and farmers. While not identical, organic and natural are often associated. As defined by a USDA Study Team on Organic Farming, "Organic farming is a production system which avoids or largely excludes the use of synthetically compounded fertilizers, pesticides, growth regulators, and livestock feed additives. To the maximum extent feasible, organic farming systems rely upon crop rotations, crop residues, animal manures, legumes, green manures, off-farm organic wastes, mechanical cultivation, mineral-bearing rocks, and aspects of biological pest control to maintain soil productivity and tilth, to supply plant nutrients, and to control insects, weeds and other pests. sales of these products have been consistently increasing over the past years. On the other hand, Natural food and all-natural food are terms in food labeling and marketing with several definitions, often implying foods that are not manufactured by processing. In some countries like the United Kingdom, the term "natural" is defined and regulated in others, such as the United States, the term *natural* is not enforced for food labels, although there is USDA regulation of organic labeling.^[3]

FSIS is a subsection of the United States Department of Agriculture (USDA), which is tasked with the responsibility of "ensuring that the nation's commercial supply of meat, poultry, and egg products is safe, wholesome, and correctly labeled and packaged." The USDA partnered with the Food and Drug Administration (FDA) to develop and issue regulations against the inappropriate usage of "natural" labels; yet, the FDA does not have specific rules for "natural" labeling. It advised on their website "the agency has not objected to the use of the term if the food does not contain added color, artificial flavors, or synthetic substances."

As can be seen in Figure 18 sales of Natural and organic foods have increased significantly every year. Using the linear model one can forecast sales as shown in figure 19. Sales are projected to reach \$67 billion US dollars.

Figure 18

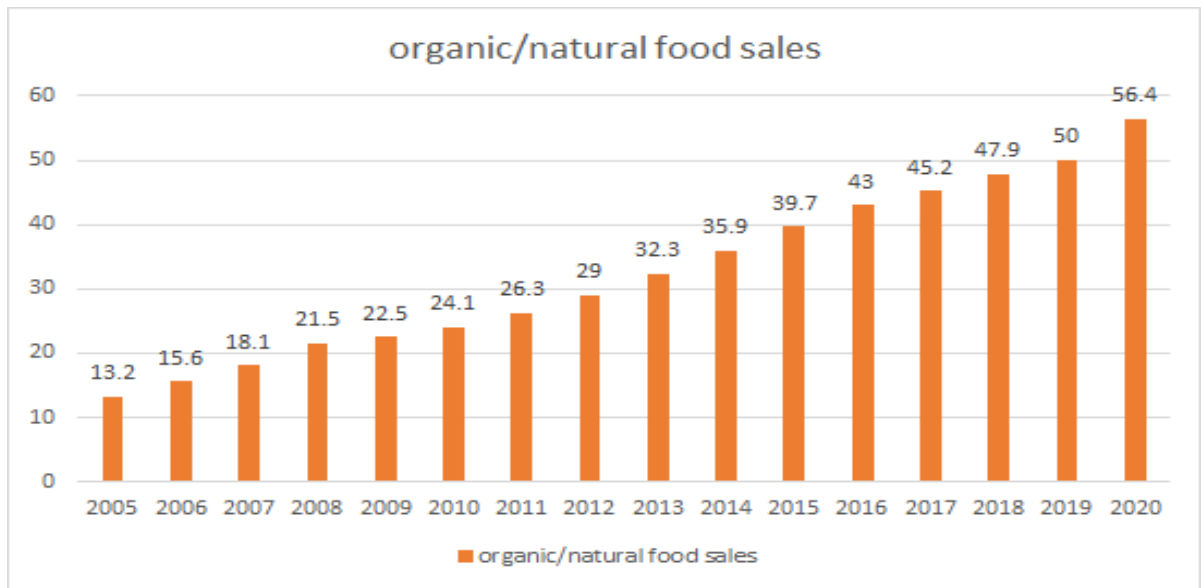
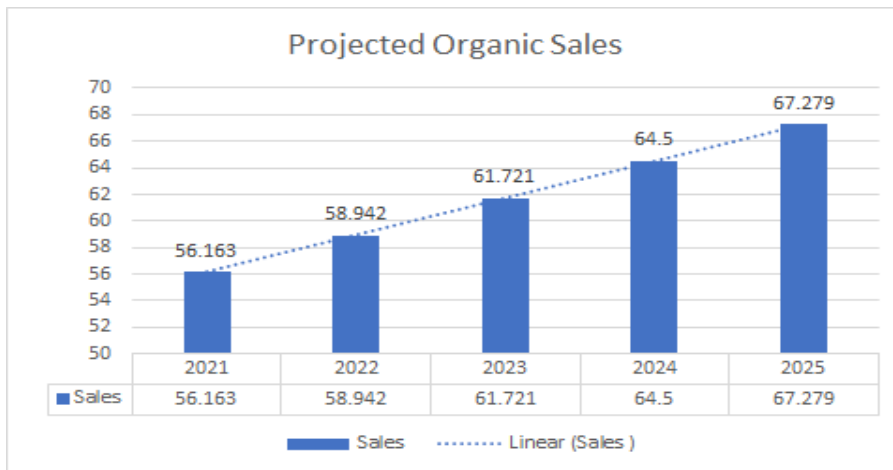


Figure 19





Plant based



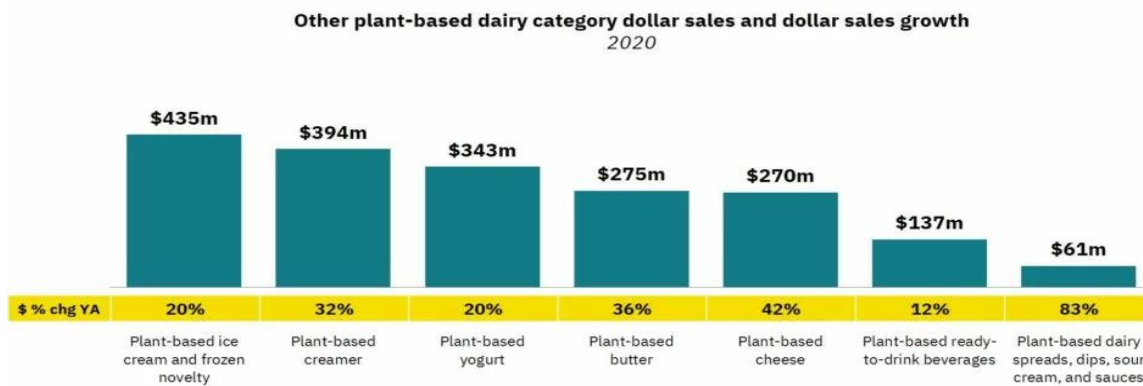
Plant-based products are a key driver of sales growth at grocery retailers nationwide, growing almost twice as fast as overall food sales. SPINS retail sales data released April 6, 2021, shows that grocery sales of plant-based foods that directly replace animal products have grown 27 percent in the past year to \$7 billion.

The plant-based specialty food and beverage market grew 42%, nearly twice as fast as the entire specialty market. Much of the growth occurred in 2020 when surge shopping served as a gateway in some categories. But the plant-based sector is shifting as big CPG players innovate in the specialty space, with massive funding and scale, and non-specialty ingredients.

A sizable and rapidly-growing category, the plant-based meat market is worth \$1.4 billion. The category increased by more than \$430 million in sales from 2019 to 2020. However, one must view this with care as only 1.4% of meat sales are plant-based and has about 18% HH penetration. One can see in Figure 20 that plant-based cheeses are estimated at US \$270 million.



Figure 20



Note: the data presented in this graph is based on custom GFJ and PBFA categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: SPINS Natural Enhanced Channel, SPINS Conventional Multi Outlet Channel (powered by IRI) | 52 Weeks Ending 12-27-2020

© 2021 The Good Food Institute, Inc.



Food manufacturers ranging from startups to leading CPG companies to the world's largest meat companies are innovating rapidly in the plant-based market. 59% of adults in the US aged 25-34 live in a household which consumes dairy alternatives

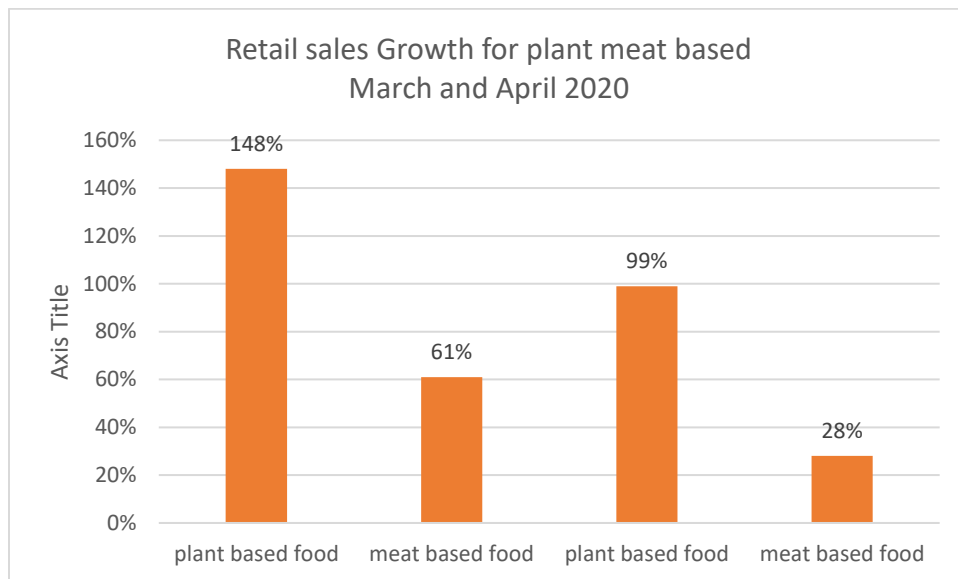
Next-generation plant-based meat, egg, and dairy products are increasingly competitive with animal products on taste, price, and accessibility. Distribution is expanding, and a growing number of mainstream consumers are buying plant-based options. In the U.S., 98 percent of people who buy plant-based meat also purchase conventional meat.

The impact of climate change and awareness of carbon emissions from intensive dairy farming continue to influence consumers' spending behavior. This is especially true of younger demographics, who are increasingly looking for foods which claim to be planet-friendly as part of wider lifestyle changes, as explored in the Mintel Trend, Hungry Planet.

While vegan and plant-based cheese remains a niche in North America, some brands are getting in ahead of the pack. These forward-thinking

plant-based producers are taking on established dairy-based cheese players with the aim of becoming the go-to, sustainable vegan cheese brand for consumers who are looking to reduce their dairy intake and lead a more sustainable lifestyle. Retail growth rates for plant and animal-based food as are shown in Figure 21.

Figure 21



Sustainability

The most often quoted definition comes from the UN World Commission on Environment and Development: “sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.”

There are a variety of implications to this concept. one aspect is how to demonstrate you are a sustainable company/product. Secondly, how



do you communicate this to the consumer? Third, do consumers value this attribute.

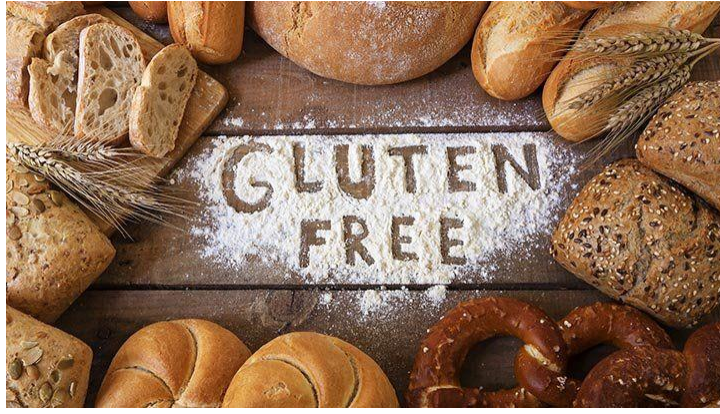
Eco-Labeling: "Labels that identify a preference for a product or service, within a specific product/service category, based on the environmental impact of the product or service throughout its life. In contrast to 'green' symbols or claim statements developed by manufacturers and service providers, an eco-label is awarded to specific products or services by an impartial third party based on defined environmental leadership criteria (adapted from the *Global Ecolabelling Network* website)."

Nearly half (48%) of U.S. consumers say they would definitely or probably change their consumption habits to reduce their impact on the environment. And these consumers are putting their dollars where their values are, spending \$128.5 billion on sustainable fast-moving consumer goods (FMCG) products this year*. Since 2014, these influential shoppers have grown sustainable product sales by nearly 20%, with a compound average growth rate (CAGR) that's four times larger than conventional products (3.5% vs -1.0%** comparatively). By 2021, we expect these sustainably minded shoppers to spend up to \$150 billion on sustainable FMCG goods an increase of \$14 billion – \$22 billion.

In the U.S., there is a large gap between generations when it comes to sustainable purchase intent. When surveyed, Millennials are twice as likely (75% vs. 34%) than Baby Boomers to say they are definitely or probably changing their habits to reduce their impact on the environment. They're also more willing to pay more for products that contain environmentally friendly or sustainable ingredients (90% vs. 61%), organic / natural ingredients (86% vs. 59%), or products that have social responsibility claims (80% vs. 48%).



Gluten Free



Gluten free foods is a growing trend in the USA. Figure 22 shows its systematic and continual growth. However, while it is growing it is still very small. Figure 23 shows that the growth rate of gluten free pasta is 12% which is significant and deserves attention at the minimum.

Figure 22

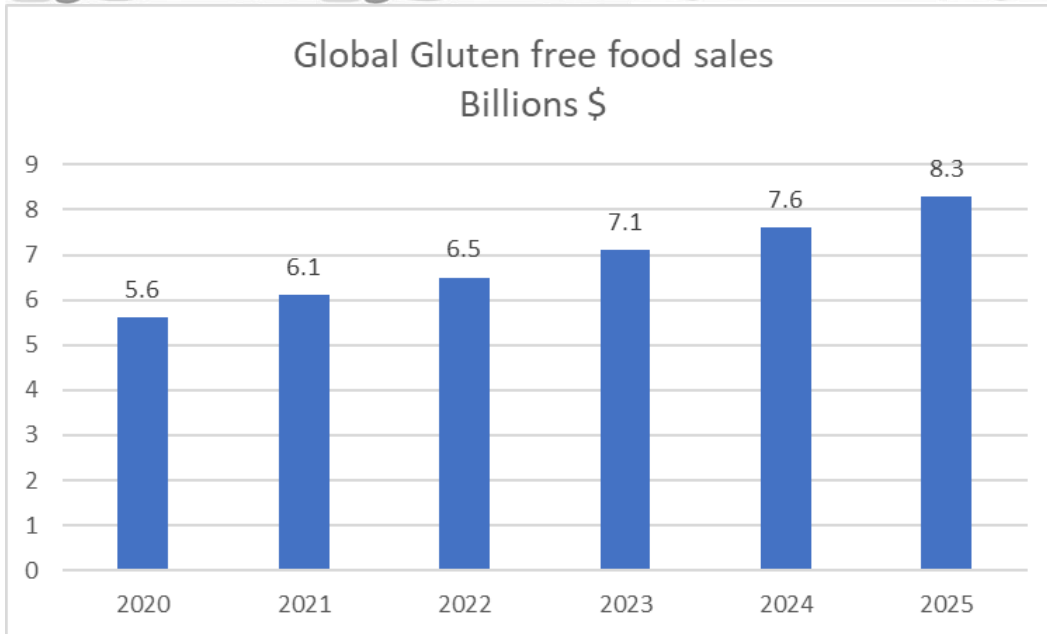
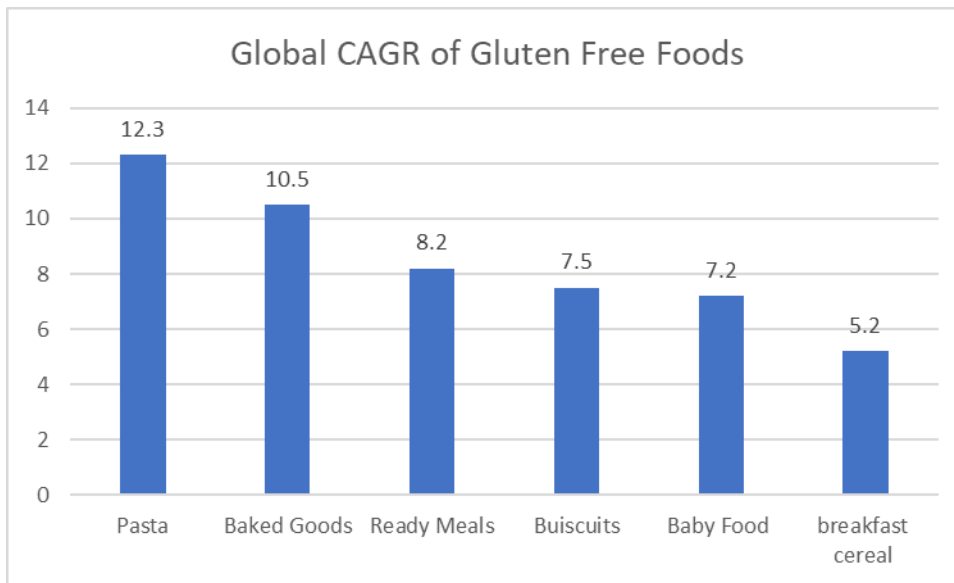


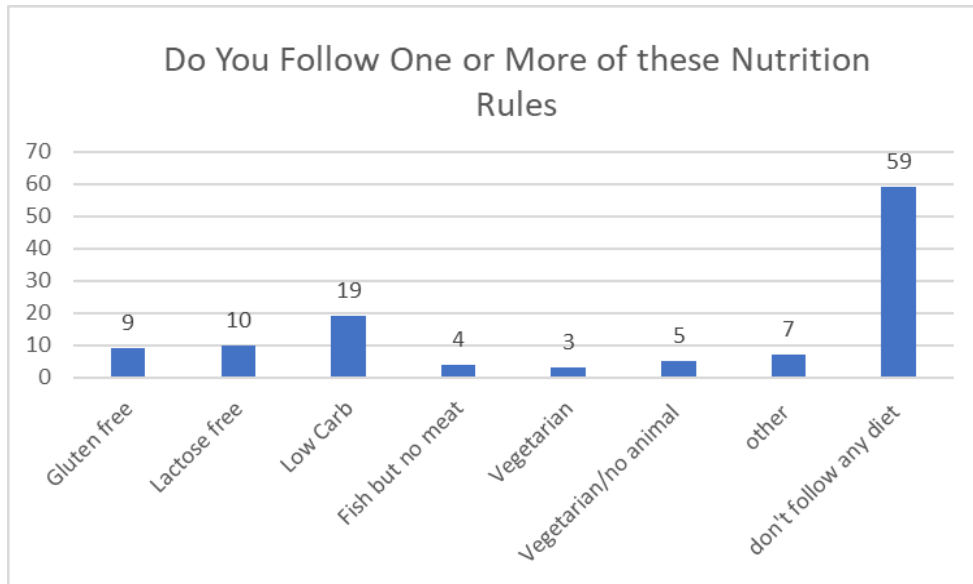
Figure 23



When consumers were asked how many were following a Gluten free diets only 9% indicated yes, See Figure 24. If you are selling gluten free products this can be an important business but if you are not it is not a major loss but a loss no less.



Figure 24



Evaluation of the consumer



There are a number of issues related to the changing consumer. The first involves the natural evolution of the consumer and the changes attributed to the Coronavirus. This will examine both changes.



Changes of the food consumer

The American family has changed. It is not the vision of Rockwell and more like the Modern Family. See figure 25. There is a Sandwich generation: adults who care for their parents as well as their own children and Boomerang kids: adult children who return to live with their parents.

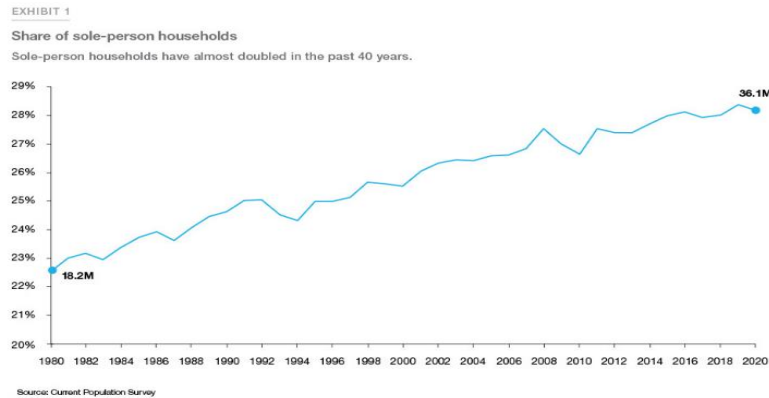
Figure 25
Comparison of Two-Family Eras



One of the biggest changes is the family size. Single person households are 27% of all American households. In the past 40 years, sole-person

households have almost doubled in the United States. According to the 2020 Current Population Survey, 36.1 million households—or 28% of all households—are sole-person. See Figure 26.

Figure 26
Growth in single person Households



The best news is that the millennials and the Gen Z are looking for more exotic tastes and flavors. The consumers have traveled and eaten foods from around the world including Italy

They are looking for special foods when they cook like pancetta and not bacon. They want authenticity. This is a key word that comes up anytime you talk with them

Multicultural America is a description of today's consumer market. The US population is made up of a variety of cultures which are changing every year. Figure 27 shows that the traditional white population is declining and by 2050 it is expected to have the smallest growth rate. on the other hand, Hispanics are expected to grow by almost 250%. This might just be educational except the white consumer is likely to be the best consumer of Italian specialty food.

However, it appears that the US Hispanic are the largest consumers of spaghetti sauce. As the fastest growing consumer segment in the U.S., with increasing incomes to spend on food, Hispanics and their importance to the U.S. specialty retailer cannot be overlooked.



Figure 27
Population of Minorities in US


<u>U.S. Population</u>	<u>1996</u> (‘000)	<u>2000</u> (‘000)	<u>2010</u> (‘000)	<u>2050</u> (‘000)	<u>% Δ</u> <u>1996-2050</u>
Total	265,253	274,634	297,716	393,931	+48
White	219,361	225,532	239,588	294,615	+34
African-American	33,611	35,454	40,109	60,592	+80
Hispanic	27,804	31,366	41,139	96,508	+247
Asian	9,728	11,245	15,265	34,352	+253

Stores of choice for Hispanics include supermarkets, specialty stores—where they can find fresh bread and produce—and discount stores. When thinking of how to put together a successful marketing and retail strategy aimed at the Hispanic segment you should consider having Spanish labels.

Consumer Food Trends

Here are some of the food trends that have been identified as growing in the US market. A trend does not automatically make it important nor does it mean it will last. It is difficult to differentiate a trend and a fad.

Pea Protein: As the worlds of meal-worthy smoothies and plant-based lifestyles collide, you're going to see pea protein offered up in place of



powders like whey and collagen, both of which are derived from animal sources. But the concept of peas as protein source doesn't stop there. More and more brands will take a cue from trendsetters like Beyond Meat and add the protein powerhouse to faux meat alternatives and vegan cheeses.

Lasagna: Can we let you in on a little industry secret? All it really takes to make (or break a trend) is for a storied media outlet to weigh in. We're not yet sure why, exactly, the Wall Street Journal thinks lasagna will blow up in 2020. But because they said so, well, we wouldn't be surprised to see it happen. It all seems a little like bringing sexy back, considering we've already got 88 lasagna recipes on this very site—but consider our interest peaked. Food brands are clearly already caching on, too: Banza (makers of our favorite chickpea pasta) recently released their first-ever lasagna noodles.

Fast Food Breakfast: If 2019 was the year fast food joints boosted their plant-based offerings, 2020 will be the year they diversify their breakfast options. Pretty much every single major chain is putting out new breakfast options. Wendy's announced its breakfast menu will be rolling out nationwide this year, Burger King is testing a Breakfast Croissan'wich (stuffed with an Impossible Foods sausage patty, naturally), and McDonald's finally deemed the McGriddle worthy of an update: A chicken version should be hitting more locations soon.

Pizza: Italians might scoff at the sight of this on a trends list considering it's a century-old Roman cooking method that produces lighter, fluffier, and marginally healthier pizza (it's easier to digest due to the rice, soy, and wheat flours used). But it's starting to gain more traction stateside, too. San Francisco's Montesacro, which claims to be America's original pizzeria, seems to be attempting a cross-country takeover (and fans aren't mad about it). They expanded to Portland, OR, first and came to Brooklyn most recently.

Unconventional “Charcuterie” Boards: Charcuterie is, quite literally, "cold cooked meats collectively" (sorry), but creative folk have been



playing fast and loose with the term and creating painstakingly arranged candy "charcuterie" boards and other dessert-inspired displays. They've been especially trendy when pegged to a holiday, but consider this your permission to start employing the trend year round—with whatever food you want

Flexitarianism: Veganism is polarizing. Even vegetarianism can be. That's why you're going to notice an uptick in people who call themselves flexitarians, aka those who follow a largely plant-based diet but also eat meat and animal byproducts on occasion. Nielsen reports 37% of the people purchasing meat alternatives are people who identify as such. As this number rises, so to will trends that are already popular with the veg-head set, like Meatless Monday and meat-free fast-food alternatives

Promotion and Marketing


The key to success for any product is to get both “your product on the shelf “and also to get consumers to take it “off the shelf.” There is a large assortment of techniques to gain both shelf space called trade promotions and consumer sales called advertising. Equally important is the social media advertising. Generally, the smaller importing comes rely much more on trade promotions to get shelf space. It makes no sense on a limited budget to spend money on consumer advertising if you don't have distribution.

Trade promotion

Most successful companies use some combination of trade promotions techniques. below s a list of various trade promotions. Most successful companies use some combination of trade promotions techniques

Shelf space fees or “slotting fees”

Shelf space fees are amounts paid by suppliers for specific shelf position or location.



Slotting fees are often used as a generic expression to refer to payments for shelf position or availability. Technically, slotting is a payment to make room in a store (either warehouse or shelf) for a new product, or an existing product into a new store. The expression refers to “making space or a new slot for the product.” Shelf space fees are simply payments made to get a specific shelf location whether or not the product is new or existing;

Billbacks – An amount paid by a supplier to a distributor for the difference between the distributors’ initial acquisition price and the actual agreed upon price for products/services sold to a specific end customer or partner. This is a means to give a special price deal to the retailer without actually changing the official price;

In-store advertising (includes signage and displays) – Types of brand promotion given to retailers at reduced or no cost, including, but are not limited to, standing displays, end cap displays, mobile displays hanging from the ceiling, advertisements on carts, caps on fuel nozzles, commercials broadcast over the sound system, and stickers on coolers or shelves;

End cap fees – Usually a large pile of product stacked at the end of each aisle for which a supplier must pay for the space. These fees may also be captured as in-store advertising but end caps are so frequent and common that some companies prefer to have a separate accounting category for this area of trade promotion;

Payment terms – The manufacturer may give the retailer favorable terms such as “net 60.” This means that the retailer does not have to pay for a shipment until 60 days after it is received. Since in many cases the product is sold faster than 60 days the retailer effectively does not pay for the product until after it is sold;

Annual fees – A charge a retailer would make to keep a product authorized for a specific time period such as a year;

Free items on launch – An offer of additional merchandise for retailers for an initial stocking of a product;



Return fees – A fee charged back to a manufacturer if the retailer is expected to take back consumer returns for any reason. It is often an agreed percentage;

Reverse logistic fee – Fees associated with a retailer required to make product returns and engage some sort of logistical service to make those returns;

New store fee – Manufacturers are expected to help with new store openings by providing free product, displays and, in many cases, cash;

Inventory allowance – Where there is an issue related to the inventory (e.g., wrong product delivered, damaged, out of date, etc.) the retailer allowance is the amount the retailer is compensated for the defective product;

Volume pricing – If a retailer buys more volume of a product, then some predetermined discount is given to the generally accepted retail price;

Promotions such as BOGO – Suppliers pay for retailers to feature their products in promotions to consumers such as discounted pricing for purchasing multiple items like a BOGO promotion.

BOGOs are best used when products have a limited shelf life such as fresh foods or snack foods such as potato chips. When a consumer has multiple packages of potato chips in the house, they are more likely to all be consumed, thus increasing total demand. Items such as paper towels or canned soup are not good candidates because you do not use more just because they are in the house. Thus, for these products you simply had forward buying with little net increase in sales. The primary impact on the retailer is to increase demand over a longer period (for those products for which BOGOs make sense);

Ads in retailer circulars – Suppliers can pay to be included in the retailer circulars or other print media produced by the retailer which advertise products available at the retailer and/or special promotions; and

Sampling – Consumers may try a product through free samples in the store provided by a representative of the brand or the distributor.



Best Practices: Social media


In today's market you cannot ignore social media. Some small to medium size companies rely solely on social to promote their products. The usage rate among consumers varies by age. Social media usage has been surveyed by the Pew Foundation and shows that 84% of adults aged 18 to 29 use social media daily, 81% adults aged 30 to 49 use social media daily, 73% adults aged 50 to 64 use social media daily, and 45% adults over 65 use social media daily. The average usage rate for consumers is 2.5 hours per day.

Social media is growing in terms of its reach and impact, and this statistic is here to show just that. 54% of social browsers use social media to research products (GlobalWebIndex, 2018). More buyers are joining social media networks and looking for reviews and recommendations. That's why it's essential to have a prominent online presence on various social media platforms. The key is to find out which social media platform your target market is using most often and how to make the most out of it.

Here are tips on successful social media:

Before you start any social media outreach, define your target audiences. How old are they? Do the people in your audience tend to be more female than male? What groups, organizations, or associations are they likely to join? Are they foodies? Or just people who like to eat healthy or unique foods? Think about the kind of people you market to and want to use your business -- then hang out with them via social media outlets.

Once your target audiences are defined, locate them online. Search Facebook, YouTube, Twitter, and Pinterest for groups, organizations, channels, or discussions that would contain the people you're looking to meet.



Use social media search and organizational tools to help you find your audiences. Some sites like Facebook and YouTube have great, built-in search functions that will help you find your audience. To find your audience on Twitter, try using external sites like [Twibes](#).

Once you've found your audience on these sites, join their groups and lists so you can follow the ongoing conversation. Don't jump right in with a sales pitch! Listen instead. Learn the etiquette and major players. Spend some time just following along.

After you're familiar with the etiquette and people involved, jump into the conversation when and where appropriate. Don't hide who you are or the company you represent. Become a regular voice in the conversation and offer your friendly expertise to others. Invite people back to your website and social media accounts to see what it is you do and offer.

Once you're a regular voice in the conversation, don't be shy about doing a little promotion. Contests, giveaways, and raffles can be great tools for audience interaction and promotion of your products. People will love the chance to play in your contest and will invite friends to join in the fun.

As your audience grows, stay creative. Invent new ways to engage your audience and encourage them to invite their friends. Continue to avoid hard sales pitches. People don't forward commercials to their friends. They forward value.

Don't try to do everything everywhere. Focus on the top two or three social media sites that have proven to contain the largest number of people in your target audience. Remember, social media provides you with the opportunity to meet your audience -- not sell to your audience. People join these social media networks and participate for friendly interaction and the value it adds to their day. Provide that friendly interaction, and watch your audience grow.



Best Practices Advertising

There are two key components to advertising: the strategy and the tactics. The best approach is to have an agency that can take you through the process. Each company and each product have both some common and some unique aspects. Specialty food products typically refer to the unique and high value food items made at relatively lower quantities. Therefore, advertising must be directed to issues related to these aspects.


it should be clear that the expense of traditional advertising may not be warranted given the market size and potential return on investment.

Lack of awareness: One of the most common issues with specialty food is that your target customers do not know they exist. When that is the case, there is little to no chance that they look up for these products online. the objective of advertising must be to increase awareness for your brand. It should be consistent with any social media program you are undertaking.

Higher pricing: Another notable fact is that the price of specialty foods is higher than that of the other foods. This is natural given that these are not mainstream products and are hence made in relatively lower volumes. So, although these specialty foods have a dedicated customer base, high prices may stop some customers from buying them.

One can examine what the specialty food industry is currently advertising to get an idea of what competition is saying to consumers. Marketing and positioning claims are an important branding element, too. Sales from positioning claims were led by:

- Natural (68%)
- Organic (55%)
- Non-GMO (45%)
- Locally-sourced (41%)
- Eco-friendly (40%)
- Ethical (37%)
- Fair trade (36%)

- 
- Plant-based (34%)
 - Gluten-free (27%)
 - Sustainable (25%)

Best Practices: The Sales Call

Everyone has their opinion as what qualifies as best practices in the food industry. I would like to quote from the Specialty Food Association. they breakdown best practices into things to do BEFORE you meet a buyer and things you do AFTER you meet the buyer. Some of these practices may seem obvious but it is important to execute the obvious. It is like a golf swing. the Pro can tell you what to do but unless you actually do it, you fail!

Recognize meetings with a buyer are both a privilege and an opportunity. (At least 100 other vendors would love to be sitting in your place.) Understand what you can accomplish in 10 minutes, don't plan for more time then they will give you. half a presentation is worse than no presentation. Be polite, professional, polished and make sure that your written materials that you offer to leave behind. You can offer samples but most buyers will be overwhelmed with materials. If a buyer is interested, they may ask you to send samples. First impressions do matter! There are virtually a limitless number of products that buyers can select from. You need to distinguish yourself and your products with your presentation. Be prepared to summarize (in about 2 minutes) why these valued customers need your products. You may want to practice this beforehand.

The buyer wants to know how you intend to generate sales if they put it on the shelf. Define your go to market strategy Be clear are you a full-service specialty distributor, Hybrid distributor, Wholesaler, Direct • None are mutually exclusive if pricing structure/brackets are established. Are you ready to do business? Do you sell direct to retailers? you must know the targeted end user for your product.



- a. While your product is very important the buyer is interested in other things such as: Liability insurance requirements
- b. Reclamation policy vs. spoils allowance
- c. Pricing structures in the marketplace – Direct sell vs. wholesaler vs. full-service specialty distributor
- d. Case pack optimization •
- e. Exclusivity: no one distributor can reach all your potential customers
- f. Operations – What is the capacity of your production facility? –
- g. At what level are you currently operating? –
- h. Freight factors and Warehouse locations

Before the meeting

1. Be a stickler for details Make sure product meets all labeling regulations. Many specialty products gain initial distribution in smaller/independent stores that are not as demanding as larger retailers. Make sure you are ready with the following before approaching larger companies: FDA compliant labeling • Scan-able UPC codes

Provide all pertinent information about the product(s), in written form...including shelf life, ingredients etc., and where the product is currently being sold.



2. Know your product's competition. How do you currently perform compared to competition? Are you an opportunity to trade up for consumers? Does your product enhance the category? How?

3. Do your research: Costs can increase as you expand distribution beyond local retailers: • Supermarkets and distributors expect introductory and ongoing promotional programs • Guaranteed sale agreements can result in deductions (chargebacks). • Make sure to identify all potential expenses before confirming an order

Learn about the customer you are selling to via Web research or Press or Actual store visit (or stores the distributor services) . Also look at trade publications and Brokers

4. Know in detail Pricing & Profit Margins: Know gross profit margins expected by target retailers and distributors > Know reasonable SRP (Suggested Retail Price) > Distributor Pricing Discussion Tips: • Usually desire gross profit margin of 30% (distributor wants their landed/delivered cost to be 70% of price they will charge retailer). • Do you have a direct selling price for retailers that will not compete with the distributors? This will give you a better chance of working with a distributor. > Retailer Pricing Discussion Tips: • SRP should be compatible with the store's pricing but also not stray from current pricing in existing stores • Cost (retailer purchasing price) should match the price a distributor would be expected to charge the retailer



5. Do You Know Terms of Sale: Costs can increase as you expand distribution beyond local retailers: • Supermarkets and distributors expect introductory and ongoing promotional programs • Guaranteed sale agreements can result in deductions (chargebacks). • Make sure to identify all potential expenses before confirming an order

6. Taste it: > If possible, provide a taste of the product...if you are trying to sell a complete line, focus on the product(s) that stand out.

7. Presentation Matters: Make 3 quick bullet points emphasizing the merits of your brand. Include the sell sheet and it shows breadth of the line. Is label FDA and Weights and Measures compliant? How is your product going to enhance the product mix of a category? How is your product going to generate profit dollars in a category? remember the buyer is interested making money his/her stores, not yur profits!

At the Meeting:

Basics: Bring a copy of your schedule. Arrive 15 minutes prior to your meeting (this is EXTREMEY important in the USA). Bring along a brief statement about your product and bring product samples. Send thank you notes. Follow up!

Certifications



CBP


If you are interested in importing food for commercial purposes, you may want to consult with a U.S. Customs and Border Protection (CBP) Import Specialist at the U.S. port of entry or at the Agriculture and Prepared Products Center for Excellence and Expertise (cee-agriculture@cbp.dhs.gov). The Import Specialist can let you know what is required, which varies depending on the type of food, the country of origin of the food, as well as whether or not there are quota or other restrictions on what you want to import.

As an importer, you have the option of hiring a Customs Broker to file your entry with CBP, or you can do it yourself - although there are so many details to handle when importing food items, we strongly advise using a broker. To obtain a list of licensed Customs Brokers: (1.) Please go to CBP.gov (2.) Enter "find a broker" in the search box. (3.) Click on "Locate a Port of Entry" (4.) Click on the "State" (5.) Click on the "Port Name" (6.) Scroll down to "Brokers"

The U. S. Department of Agriculture (USDA), and U.S. Food and Drug Administration (FDA) determine the admissibility of various food products imported into the United States. The U.S. Fish & Wildlife Service (USFWS) is responsible for food products derived from wildlife. CBP enforces those requirements. All commercial imports of food and beverage products require the filing of Prior Notice (PN) with FDA and, if the products contain meat, egg, milk, poultry, or other animal origin products, may require permits, health certificates, and/or other specified certifications from the country of origin.

In general, these requirements DO NOT apply to food accompanying a traveler into the United States or being sent by an individual (not a business) for personal use. However, you should contact the above-mentioned government agencies for their requirements.

Foreign manufacturers and/or distributors of food products must register with FDA before their goods may be admitted.



CBP will not release food shipments without proof that PN has been filed with FDA. Therefore, it is imperative that the PN satisfied number is submitted to CBP along with the entry documents. The PN satisfied number should be annotated on the shipping documents (i.e. bill of lading or airway bill).

In addition to the prior notice requirement, once the goods arrive in the United States, FDA may collect a sample or tell CBP to proceed with releasing the shipment. If a sample is in violation of FDA regulations, you will receive a Notice of Detention from FDA. To find out the status of food that has been detained by FDA, contact them at the number referenced on the detention notice or the main number for Import Operations and Policy at (301)796-0356).

IGP/DOP


Acronyms like IGP and DOP show that the product — be it pecorino or prosciutto — is legally guaranteed by the European Union to be "authentic," or made in the original town or region with real ingredients. (In other words: Parmigiano Reggiano DOP promises that there are no wood chips in "Parmesan cheese" allowed.)

Indicazione Geografica Protetta (Indication of Geographic Protection)

The IGP label shows that the quality or reputation of your food or condiment is linked to the place or region where it is produced, processed, or prepared. While **DOP** *Denomination d'Origine Protetta* | Protected Designation of Origin guarantees that your favorite cheese, prosciutto, olive oil, etc., is produced, processed, and packaged in a specific geographical zone and according to tradition. Each step, from production to packaging, is regulated.

Retail Environment

The most important element in the retail environment is which retail outlet you are selling in. While specialty stores appear to be a major



distributions source, only 24% of consumers shop specialty food stores versus traditional supermarkets which is 70% and Natural Food stores at 45% . (see Figure 6). This means that if you are selling to supermarkets you must play an important role in the display characteristics. The traditional grocery store displays their specialty foods in various ways. Some stores place the food within the category. For example, the specialty cheeses may be merchandised with all the other cheeses. while other stores may have a specialty food section.

Large formats are really key, but exploration into tertiary outlets like wine and liquor stores, which have a robust selection of specialty items and are growing rapidly, make great sense for specialty brands since some of the heaviest buyers like to shop them.

You cannot ignore the on-line market place. More than 8 in 10 adults who ordered online in 2021 are specialty food consumers. This is significant since 57 percent of all adults ordered online this year, up 76 percent vs. 2020. Obviously, a key target for specialty brands that are selling their products direct-to-consumer through online, is to understand that the vast majority of these consumers are specialty food users,

Retail changes

There have been some significant changes in the retail industry that affects the specialty food business (as well as all products). this section will focus on those changes that most affect specialty foods.



Grocerants

A grocerant is a hybrid of grocery store and restaurant. Grocerants offer freshly prepared, ready-to-eat, or ready-to-heat foods inside a store setting. For example, a grocerant can be the fast-casual cafe inside of an upmarket grocery store or the freshly made, grab-and-go offerings of a convenience store. The percentage of specialty foods in a grocerant is much higher than a traditional grocery store or convenience store.

NPD's food-service market research found that in-store dining and take-out prepared foods from grocers has grown 30% over the past eight years, accounting for \$10 billion of consumer spending in 2015. By NPD's count, more than 40% of the U.S. population purchases prepared food from grocery stores -- and this number could grow as Millennials increasingly warm to the crazy idea of getting their food not from Seamless but from the supermarket. According to NPD spokesperson Kim McLynn, "grocerants" can range from yuppie-chic (see New York City's Eataly) to conventional-seeming grocers, like H-E-B Grocery in San Antonio, Texas, Buehler's in Wooster, Ohio, Hy-Vee in Bloomington, Illinois and Whole Foods in Austin, Texas. Figure 28 shows that food is being prepared in a grocery store setting and millennials love this!

Figure 28
Grocerant



Ghost Kitchens

They're not as scary as they sound. In short, a ghost kitchen is one where restaurants strip the setting of any in-house dining options, creating a large commercial space that can churn out more food. This results in delivery- or pick-up-only restaurants. Last year, we saw companies beginning to experiment with the model: Chick-fil-A piloted a program to test three delivery-only spots in three major cities. Pending their success, 2020 could be the year they go nationwide and more companies hop on board.

Food Brokers

Most all specialty food companies use food brokers. and like many business decisions there are pros and Cons to brokers. However, it would be very difficult for a specialty food business to sell to the traditional channels without a broker. the traditional stores have thousands of products to buy and sell and they cannot be distracted by a company that sells a couple SKUs of cheese or salami. A good broker provides three main types of services for their clients.

First, they meet with buyers at retailers' headquarters to sell – to win and maintain business for their client's products. I call this activity 'white collar'.



Second, they provide services in stores; things like merchandising, setting up promotional displays, making sure the right price tags are on the shelves, and managing the business at the store level. I'd call them 'blue collar' activities.

The third type of services are clerical and administrative. What used to be paperwork but is now mostly online; orders of merchandise from retailers, invoices, payments and tracking shipments.

If the brokers do a good job, they will allow you to focus on other aspects of your business. Brokers allow you to spend less time on sales, and more time on production. The biggest reason small business chooses to work with food brokers is to free up time. Running a business is a full-time job, and expanding a business can be overwhelming for many manufacturers. Both production and selling are significant factors of running a business and require equal attention. Hiring a broker to take care of sales allows business owners to focus their time elsewhere.

1) *Brokers can also act as business advisors.* They have a close working relationship with stores and can provide valuable feedback from retailers and customers, including how products are selling, the reaction of consumers to new and existing items, and current market trends, both locally and nationally. Utilizing this information can help you fine-tune aspects of your business that might not be working, and expand the elements that are.

2) *Brokers are more cost-effective than hiring a sales team*

Although it can be costly to hire a broker, it may save you money in the long run. Whether you are meeting with stores yourself or hiring your own sales representatives, the costs associated with pitching new products can add up. Traveling to different stores uses up fuel and time, and can put a financial burden on your business.

Hiring sales representatives for your brand can come with some high costs as well. Not only will you be taking on new employee salaries, but you will also be responsible for travel expenses for these employees.



Depending on the size of the territory, overnight travel may be necessary, resulting in hotel, fuel, and food costs. Even though using a broker or your own sales team isn't necessary to expand the area of your business, they are the best options. Analyzing your goals and the current size of your business can help you decide which one is best for you.

3) Brokers have connections

Brokers are already established in the industry and have connections that most food businesses do not. Even smaller brokers already have relationships with buyers and managers that give them a boost when presenting new items. Whether it's smaller local markets or large chain stores, brokers know who to talk to about getting your product into the store. Some large stores will not even meet directly with food business owners or manufacturers, in which case a broker may be your only way into the store.

The established relationships brokers have can also help save time and money. Just like it may be more cost effective to hire a broker rather than assembling your own sales team, it can be more time effective too. Networking with buyers and store managers takes up large amounts of time, and it can take years to build the same type of relationships, and trust brokers already have.

4) Brokers do more than sell.

It may seem like the only job of a broker is to get your product onto the shelf, but they do much more than that. While brokers do employ sales representatives to sell in products, they can also help to grow your business through other methods. Many brokers will work with stores to market the product and coordinate demos, especially during events and promotional sales. They not only help establish your presence in the store, but they also increase your overall marketing, making it easier for consumers to become familiar with your brand.

Brokers also work with stores to make sure your products stay on the shelf. When buyers are conducting category reviews and looking at



which brands to cut, having a broker presence can offer protection. If your product is on the chopping block, they can negotiate promotions and deals to keep your product in the store. Additionally, they can provide information on sales and store feedback, which is a tremendous help to the business side of your brand.

However, food brokers are not a gift from God. They come with some negatives as well. Brokers represent multiple brands — not just yours. The larger the broker, the higher the chances are that they're representing other brands with products similar to yours. Brokers can represent hundreds to thousands of individual products, which can make it more difficult for smaller items to stand out and get the same level of promotion. In fact, brokers may often prioritize larger brands with higher sales over smaller ones to keep profits high.

Brokers are subject to the same shelf and space restrictions in stores that direct sellers are. Let's say a broker represents two brands. Both brands sell potato chips, and both have new competing items. One brand is larger and more established, while the other is a small up and coming company. If a store only has one spot available for a new product, the broker may promote the larger company, since it already has a proven track record for sales. This decision isn't based on the quality of the products but is a business decision. And remember, food brokerages are a business.

Food brokers may save your business time, but they come at a price. Depending on the broker, they will charge a commission fee of anywhere from 5–10% (or higher). On top of this, some brokers may charge a monthly fee or retainer amount to ensure they are making a profit.

There are also intro discounts to consider. To get your product into a store, brokers will want to offer buyers an incentive (see section MM on Trade promotions). These fees might look good to stores but can



hurt your small business if you are not ready for this type of investment.

That said, it's important to remember that brokers make money by selling your products. They have an excellent incentive to get your product into stores and will work to make sure that happens.

Brokers might not share your same values

When presenting your products, brokers convey your brand's message to buyers. Having someone else selling your product isn't always the same as selling it yourself. As the creator of your product, you are the expert. You know the source of the ingredients, what goes into the manufacturing process, and the details about the end product such as price point, demand, etc. But beyond that, you know the story and values that go into your product. The passion you have for your company is something that is hard for brokers to capture during a sales pitch.

Working with a broker may mean giving up that personal touch that comes with presenting your products yourself. In some cases, small specialty stores are more interested in working with the owner of the company than with a broker. Knowing your sales goals and what types of stores you want to see your product in can help you decide whether or not this a broker is the best choice for your company.

Brokers may require exclusivity

Most brokers will want exclusive rights to represent your products in a geographic location, keeping them from competing against each other and presenting the same products to the same store. If you have two brokers trying to sell your product to the same Whole Foods region, this can create a negative image for your company. Stores may view your brand as inexperienced and unprofessional and may be unwilling to stock your products, broker or not.

Even though you are giving the brokers the selling rights only (not the actual rights to your product), this can still be uncomfortable for many



small businesses. If you are used to having control over your product, giving up this control may not be something you aren't ready for.

Appendix A contains list of food brokers in the northeast US

SJU Resources

The Department of Food Marketing is a complete resource for food companies. The faculty is made up of food marketing specialist who have practical food marketing experience as well as academic credentials.

The department does contract research through the Academy of Food Marketing as well as offering both undergraduate and graduate degrees. The degree program has been rated the 7th best Food marketing program in the world.

Dr. John L. Stanton is chairman of the department. He is a full professor and has been studying food marketing for 40 year. Dr Stanton taught at the University of Bologna for a number of years. He has been vice president of marketing a multinational coffee and lived in Germany working for Erivan Haub and Tengelmann. He was elected in the European hall of Fame, the Private Label Manufacturers Hall of Fame and Trade Promotion Optimization Association Hall of Honor. Dr Stanton has written 13 books on marketing, some of which have been translated into other languages. Dr Stanton has been a expert witness in 50 food legal cases.

Dr. Stanton's resume along with the other faculty are shown in Appendix C

Appendix A Food Brokers and Supermarket information

Appendix A

Food Brokers New Jersey

- **Advantage Sales & Marketing**
Contact: Randy Allen
535 East Crescent Avenue
Ramsey, NJ 07446-1208
201-825-9400; Fax: 201-825-8556
email: rdallen456@aol.com
- **E.A. Berg & Sons, Inc.**
Contact: Paul Nadel
9 Brook Avenue
Maywood, NJ 07607-1130
201-845-8200 Fax: 201-845-8201
email: paulnadel@eaberg.com; Web site: eaberg.com
- **Cappetta Associates, LLC**
Contact: Kathleen Cappetta, President, and Co-Founder
1814 East Route 70
Cherry Hill, NJ 08003
888-795-4541; 856-795-4541
email: kathleen@cappettasales.com; Website:cappetta-associates.com
- **Crossmark**
Contact: Randy Allen
10 Mountainview Road, Suite C101
Upper Saddle River, NJ 07458-1933
609-694-7643
email: Randy.allen@crossmark.com
- **International Fine Foods and Confections**
Contact: Mike Hudek
370 Three Bridge Road
Monroeville, NJ 08343-1878
201-294-7057; Fax: 956-358-2422
email: mikeh0402@yahoo.com
- **Milmark Sales**
Contact: Jody Sisselman
5 Villa Court
Park Ridge, NJ 07656
201-782-1660; Fax: 201-782-0718
email: milmarksales@optonline.net
- Territory: Military PX sales
- **ESM/Metro New York**
Contact: Barry Rowen
P.O. Box 409
Montvale, NJ 07645-0409
201-949-2305; Fax: 201-782-5153
email: broweh@esm-ny.com; Website: esm-web.com
- Territory: Metropolitan NY, NJ, CT, DE, PA (Philadelphia)
- **Golden Sales Associates, Inc.**
Contact: Jeffrey Katz
12 Country Club Lane
Marlboro, NJ 07746-1447
732-462-6004; Fax: 732-462-1964
email: candysale@aol.com
- Territory: Metro NY and NJ
- **Golick Martins, Inc.**
Contact: Manny Martins
140 Sylvan Avenue, #7
Englewood Cliffs, NJ 07632-2502
201-592-8800; Fax: 201-592-9196
email: mmartins@golickmartins.com; Website:
golickmartinsinc.com
- Territory: NY, NJ, CT, PA, MD, DE
- **H&H Specialty Food Associates**
Contact: Ted Breitowich
43 West Front Street, Suite 10
Red Bank, NJ 07701-1600
732-933-4411; Fax: 732-933-4412
email: ted@hhspecialtyfoods.com; Website: hhspecialtyfoods.com
- Territory: New England, Metro NY/NJ, Mid-Atlantic
- **Michael Azurak Brokerage**
Contact: Mike Azurak
17 Domino Road
Somerset, NJ 0887-4134
732-356-3826; Fax: 732-356-6057
- Territory: NY, NJ, PA, DE, WV
- Contact: Nancy K. Waterhouse
166 Crescent Avenue
Waldwick, NJ 07463-1324
201-670-1000; Fax: 201-670-1811
email: nrfds@aol.com

Appendix A

Food Brokers New Jersey

- **Talier Trading Group, Inc.**
Contact: Jim Talier
411 53rd Street, Suite E
West New York, NJ 07093
201-484-0306; Fax: 309-419-2403
email: info@taliertradinggroup.com; Website:
taliertradinggroup.com
- Territory: National
- **Tom Manning Associates**
Contact: Thomas Manning
220 Pascack Avenue
Emerson, NJ 0763-1061
201-262-3578; Fax: 201-634-1298
email: tmanning10@verizon.net
- Territory: NJ and lower NY
- **World Finer Foods, Inc. /Liberty Richter**
300 Broadacres Drive
Bloomfield, NJ 07003
973-338-0300; Fax: 973-338-0382
email: nkasket@worldfiner.com; Website:
libertyrichter.com
- **Schnakenberg Associates, Inc.**
Contact: John H. Schnakenberg
230 Oak Tree Road
Mountainside, NJ 07092-1824
908-654-1133; Fax: 908-654-3737
- **Specialty Food Network LLC**
Contact: Bonnie M. Brauner
1 Colton Circle
West Orange, NJ 07052
973-325-5723; Fax: 973-325-5724
email: bonniebrauner@gmail.com
- Territory: NJ, NY, CT, DE, Eastern PA
- **Strand Specialty Sales**
Contact: John Strand
551 Monroe Court
River Edge, NJ 07661
201-261-6347; Fax: 201-261-6638
email: strand1@aol.com



Appendix A
Food Brokers New York

- **ABD Sales Associates Inc.**
550 Smithtown By-Pass, Suite 204
Smithtown, NY 11787-5013
631-979-4000
- **Acosta Sales & Marketing**
Executive Park Drive, Suite 103
Clifton Park, NY 12065-5630
518-373-7100; Fax: 518-373-7111
email: ddelong@acostasales
or
405 North French Road, #114
Amherst, NY 14228-2010
Fax: 716-636-0487
- **Benchmark Sales & Marketing**
3 Townline Circle
Rochester, NY 14623
585-295-8200; Fax: 585-295-8299
- **R. J. Bickert Associates, Inc.**
Contact: Roger Bickert
10205 Main Street
Clarence, NY 14031-2011
716-759-8876; Fax: 716-759-2823
email: rbickert@msn.com
- **DKB Sales & Marketing, Inc.**
Contact: Dianne Keeler-Bruce
109 West 70th Street, #3R
New York, NY 10023-4475
212-877-9676; Fax: 212-787-9522
email: dkeelerbruce@earthlink.net
- **Fancy Food Sales & Marketing Inc.**
Contact: Diane Keeler Bruce
101 West 73rd Street, Apt 2A
New York, NY 10023-2926
201-670-1000 ; Fax: 201-670-1811
email: orders@fancyfoodsalesandmarketing.com
- **Feenix Brokerage Ltd.**
Contact: Frank Pensabene, Jr.
6283 Johnson Road
Albany, NY 12203-4323
518-456-7664; Fax: 518-456-0869
email: info@feenix.net; Website: feenix.net
- **Food Associates of Syracuse Inc.**
Contact: Nick Petrosillo
71714 State Fair Blvd.
Syracuse, NY 13209
315-635-6338 Fax: 315-635-1798
email: fasco1@dreamscape
- **Frazier Foods, Ltd.**
3841 South Park Avenue
Bladsworth, NY 14219-1813
716-332-0988; Website: frazierfoods.com
- **G. A. Davis Food Service**
325 East Sunrise Highway
Lindenhurst, NY 11757
800-437-6322, 516-364-0910; Fax: 516-364-0917
Website: gadavis.com
- **GEM Food Brokers Inc.**
1260 Scottsville Road
Rochester, NY 14624
800-724-1475, 585-436-0960; Fax: 585-436-3514



Appendix A Food Brokers New York

- **Grant Hanson Associates, Inc.**
4 Executive Plaza, Suite 180
Yonkers, NY 10701
800-732-4266, 610-825-5700; Fax: 914-375-7495
- **Herb Barber & Sons Food Brokers**
7193 East Main Street
Westfield, NY 14787
716-326-4692
email: herb@herb-barber-sons.com; Website: herb-barber-sons.com
- **Hudson Valley Food Brokers**
3 Wembley Court, #102
Albany, NY 12205-3836
518-786-9174; Fax: 518-786-9176
email: hudsonvalleyfood@aol.com
- **J'Al Besoin Ltd.**
Contact: Conni Kalman
20 Ridge Drive
Melville, NY 11747-1012
631-424-5353; Fax: 631-424-0130
email: c.kalman@juno.com; Website: c.kalman@juno.com
- **Laurie Neiman-Specialty Food Brokers**
Contact: Laurie Neiman
222 West 83rd Street, Apt 4F
New York, NY 10024-4916
212-712-9202; Fax: 212-712-1963
email: lneiman@mindspring.com
- **Lomac & May Associates**
17 Wather Way
Albany, NY 12205-4945
518-452-7041; Fax: 518-452-2826
- **Karam Food**
Contact: Lorrie B. Karam
17 Magnolia Drive
Dobbs Ferry, NY 10522-3508
914-693-6338; Fax: 914-479-0067
email: karamfood@verizon.net
- **Mid-State Food Brokers, Inc.**
7489 Henry Clay
Liverpool, NY 13088-3545
315-451-2080; Fax: 315-457-3408
Website: midstatefood.com
- **M&Y Sales Associates Inc.**
Contact: John W. Yates
1 Central Avenue
Tarrytown, NY 10591
914-332-1414; Fax: 914-332-4882
email: mysalesassoc@aol.com
- **National Retail Marketing Network, Inc.**
Contact: Thomas Lieb
60 East 42nd Street, Suite 2226
New York, NY 10022
212-527-7582; Fax: 212-658-9156
email: telelb8137@gmail.com
- **New Horizons Foods & Marketing**
Contact: Jim Robinson
306 Lakeside Road
Syracuse, NY 13209-9729
315-488-3101; Fax: 315-488-6018
email: jim_robinson@newhorizonssales.com; Website: thefoodbrokers.com
- **Provender International Corporation**
Contact: Joseph Lombardi
P. O. Box 3184
East Hampton, NY 11937-1413
631-324-3474, 800-678-5603; Fax: 631-907-8711
email: provend@optonline.net; Website: provenderonline.net

Appendix A Food Brokers New York

- **Reichenbach & Associates, Inc.**
One Plaza Road, Suite 104
Greenvale, NY 11548
516-674-9200; Fax: 516-674-3172
Website: reichenbach-assoc.com
- **R. J. Bickert Associates Inc.**
Contact: Roger Bickert
10205 Main Street
Clarence, NY 14031-2011
716-759-8876; Fax: 716-759-2823
email: rbickert@msn.com
- Territory: Upstate NY
- **Ross Upstate Sales & Marketing, Inc.**
Contact: David Fischer
480 Broadway, Suite LL-23
Sarasota Springs, NY 12866
518-583-6633; Fax: 518-583-6635
email: dfischer@rossupstate.com; Website: upstateconfectionery.com
- **RJM Trading**
Contact: Ron Maiorino
374 North Greeley Avenue
Chapqua, NY 10514-2748
914-238-6902; Fax: 914-238-0498
email: rjnttrade@gmail.com
- Territory: NY, NJ
- **Valley Food Specialties LLC**
Contact: Mark Tytla
40 River Road
Chatham, NY 12037-3701
800-343-6631; 518-392-6851; Fax: 914-992-7278
email: info@valleyfoodspecialties.com; Website: valleyfoodspecialties.com
- **W. J. Brader**
Contact: William Brader
P.O. Box 29
Bowmansville, NY 14026-0029
716-685-6085; Fax: 716-685-6939
email: wbrader@wjbrader.com



Appendix A

Food Brokers Pennsylvania

- **Bell Export Foods Group**
Contact: Ron Davis
2701 Red Lion Road
Philadelphia, PA 19114
215-965-3338; Fax: 215-965-3339
email: ron@bellexport.com
- **Bonnie's Foods**
Contact: Bonnie Berger
3009 Runnymede Drive
Plymouth Meeting, PA 19462
215-816-6753; Fax: 215-278-8453
email: bonniesfoods@comcast.net
- **Louise Ceccarelli & Associates**
Contact: Louise Ceccarelli
8808 West Chester Pike
Upper Darby, PA, 19082-2619
610-789-3565; Fax: 610-789-3573
email: loucecca@rcn.com
- **Corky Connor LLC**
Contact: Cornelia S. Connor
4108 Yorktown Drive
Upper Chechester, PA 19061-2486
610-497-5290; Fax: 610-497-5298
email: corky.connor@verizon.net
- Territory: PA, NJ, DE
- **F. O. S. Marketing Group**
Contact: Frank Sciolla
62 Ashley Drive
Ivlyland, PA 18974-6134
215-630-6058; Fax: 215-359-1520
email: franksciollalifestyle@yahoo.com

- **Gail Kramer Associates**
Contact: Gail Kramer
19 Bala Avenue
Bala Cynwyd, PA 19004-3202
610-667-0584; Fax: 610-667-9476
email: gailkramer@ol.com
- Territory: PA, NJ, DE
- **Grant Hanson Associates, Inc.**
5211 Militia Hill Road
Plymouth Meeting, PA 19462
800-732-4266, 610-825-5700 Fax: 610-825-6912
- **Morton Schweitzer Sales**
Contact: Morton F. Schweitzer
5820 Wilkins Avenue
Pittsburgh, PA 15217-1246
412-521-3674; Fax: 412-421-2595
email: schweitzersales@aol.com
- Territory: Western PA, Eastern OH, WV
- **Santucci Associates Inc.**
Contact: Stephen DeLeo
1010 Millcreek Drive
Feasterville Trevose, PA 19053-7321
215-676-2300; Fax: 215-355-0986
email: main@santucciassoc.com; Website: santucciassoc.com
- Territory: Metro NY, NJ, PA, DE, MD, DC, VA, NC, SC
- **Thomas Catanese.com**
Contact: Tom Catanese
324 Knoll Road
Plymouth Meeting, PA 19462-7110
610-277-6230; Fax: 484-322-0717
email: tccat523@aol.com; Website: thomascatanese.com

Appendix A

Food Brokers Massachusetts

- **Acosta Sales and Marketing Company**
Lake Williams Corporate Center
130 Lizotte Drive
Marlborough, MA 01752
508-486-8366; Fax: 508-486-8695
email: mmcgoldrick@nssales.com
- **Alfred H. Gledhill & Associates**
Contact: Alfred H. Gledhill, Jr.
133 Winsor Avenue
Watertown, MA 02472-1482
617-924-6213; Fax: 617-249-1951
email: algledhill1@yahoo.com
- **Arnold H. Gitter Associates Inc.**
Contact: Arnold H. Gitter
P.O. Box 30
Marblehead, MA 01945-0030
888-773-7527, 781-631-7527; Fax: 781-631-3852
email: gitter.assoc@verizon.net
- **Baron Associates, Inc.**
Contact: Bill Baron
15 Locksley Road
Lynnfield, MA 01940-1411
866-334-3443; 781-334-2978; Fax: 781-334-3622
email: ewbaron@comcast.net
- **Benchmark Sales & Marketing, Inc.**
1400 Providence Highway, Bldg. 3, Suite 3200
Norwood, MA 02062-2626
781-746-0000; Fax: 781-746-0099;
Website: benchmarksales.com
- **Peter Blatchford Company**
Contact: Peter Blatchford
28 Middle Street
South Dartmouth, MA 02748-3414
508-994-5557; Fax: 508-994-5579
- **DeMichele Associates/Fontana e De Michele**
Contact: James DeMichele
12 Algonquin Road
Worcester, MA 01609-1702
508-755-9854; Fax: 508-755-9298
email: demicheleassociates@charter.net
- **ESM-New England**
411 Waverly Oaks Road, Suite 330
Waltham, MA 02452
781-314-7100; Fax: 781-453-4448
Website: esmne.com
- **Fresh Food Sales and Marketing**
Contact: Ed Eglitis
1001 Worcester Road, Suite 3
Framingham, MA 01701-5240
508-620-1515; Fax: 508-620-0044
email: ed.eglitis@freshfoodsales.com
- **Global Gourmet Partners**
Contact: Charles Kresser
102 Pond Street
Bridgewater, MA 02324-2033
800-465-5535; 508-697-2663; Fax: 508-697-2129
email: charlie@globalgourmetpartners.com; Website: globalgourmetpartners.com
- **Woolf Associates**
Contact: Maureen Woolf
19 Beechwood Circle
Northboro, MA 01532-2308
508-393-8173; Fax: 508-393-2496
email: maureenwoolf@charter.net



Appendix A
Food Brokers Massachusetts

- **Maggiore's Sales & Marketing**
Contact: John Maggiore
15 Lincoln Street, #166
Wakefield, MA 01880-3001
781-233-5528; Fax: 781-233-2531
- **Mulkeen-Bottaro Associates**
Contact: Roseanne Bottaro
40 Lamont Road
Buzards Bay, MA 02532-3541
508-759-5791; Fax: 508-759-3077
email: mulbot@aol.com
- Territory: MA, CT, RI, VT, NH, ME
- **North Eastern Sales Solutions**
27 Curve Street, Box 920473
Needham, MA 02492
781-444-7604; Fax: 781-444-7607
email: office@salessolutions.com
- **HousewaresDirect, Inc.**
Contact: David Spencer
20 Myles Standish Road
Weston, MA 02493-2124
877-438-4932; Fax: 877-438-4932
email: thompson@condimental.com;
Website: condimental.com
- **J. J. Sloane & Associates, Inc.**
Contact: Jeanne Degliaberti
146 West Boylston Drive, #203
Worcester, MA 01606
508-852-4444; Fax: 508-852-6077
email: jbird@jjsloaneassociates.com
- **JBM Sales and Marketing**
Contact: David Mintz
125 Washington Street, Suite 4
Foxboro, MA 02035-0188
508-543-3611; Fax: 508-543-8178
email: david@jbmsales.com; Website: jbmsales.com
Territory: ME, VT, NH, CT, MA, RI
- **JOH Specialty/A JOH Atlantic Partner**
(a Johnson, O'Hare Company, Inc.)
Contact: Arthur Papazian
One Progress Road
Billerica, MA 01821-5731
978-663-9000; Fax: 978-671-7190
email: apapazian@johare.com; Website: johare.com
- **Luke & McKenna Inc.**
Contact: Linda Luke
30 Highview Drive
Hingham, MA 02043-1216
781-740-0599; Fax: 781-741-6080
email: linda-lukemckenna@comcast.net
- **MetroFoods LTD**
Contact: Dave
1567 Broadway
Raynham, MA 02767
508-822-9635
email: David@MetroFoodsLtd.com; Website:
metrofoodsltd.com
- Territory:
- **Old Colony Foods, Inc.**
Contact: John Johnson
P. O. Box 658
Medway, MA 02053-0658
508-533-6919; Fax: 508-533-2906
email: john@oldcolonyfoods.net; Website:
oldcolonyfoods.com

Appendix A
Food Brokers Maryland

- **Chesapeake Sales**
Contact: Jack M. Epstein
12021 Grayton Run
Ellicott City, MD 21042-7114
443-535-8374; Fax: 443-535-8392
email:
jchesapeake@comcast.net
- Territory: Mid-Atlantic
- **Specialty Food Sales**
Contact: Jeff Landsman
Historic Courthouse
400 Washington Avenue
Towson, MD 21204



Appendix A Supermarkets

Acme



Acme Markets Inc. is a supermarket chain operating 162 stores throughout Connecticut, Delaware, Maryland, New Jersey, New York, and Pennsylvania and, as of 1999, is a subsidiary of Albertsons, and part of its presence in the Northeast. It is headquartered in East Whiteland Township, Pennsylvania, near Malvern, a Philadelphia suburb.

Acme was established in 1891, when Irish immigrants Samuel Robinson and Robert Crawford opened a store in South Philadelphia. The company today has 162 supermarkets^[2] under the Acme name in Connecticut, New York, New Jersey, Pennsylvania, Delaware, and Maryland.

After many decades of being the largest grocery retailer in the Delaware Valley, Acme fell to #2 behind ShopRite in 2011.^[3] As of 2013, Acme was #3 behind #1 ShopRite and #2 Giant Food Stores in the region.^[4]

Acme

Former name	Acme
Type	Subsidiary under Albertsons
HQ Location	East Whiteland Township, Pennsylvania, PA
Number of Locations	1162



Areas Served

Connecticut
Delaware
Maryland
New Jersey
New York
Pennsylvania

Key People

Jim Perkins,
President
Danielle Crop, Sr. VP

Parent
Albertsons

Albertson's

Website

<https://www.acmemarkets.com/about-us.html>

BJ Warehouse Club



BJ's Wholesale Club Holdings, Inc., commonly referred to as **BJ's**, is an American membership-only warehouse club chain based in Westborough, Massachusetts, operating on the East Coast of the United States in addition to Ohio and Michigan, with plans to expand into Indiana. BJ's offers a variety of special benefits to its members. These include "member pricing", a variety of name-brand products at discount wholesale prices, acceptance of all valid manufacturers' coupons, and acceptance of many forms of payment (cash, check, ATM/debit cards, all major credit cards, and EBT SNAP benefits).

Former name	BJ's Wholesale Club
Type	Public
HQ Location	Westborough, Massachusetts, USA
Number of Locations	229
Areas Served	East Coast of US and Ohio, Michigan



Maine
New Hampshire
Massachusetts
Delaware
Connecticut
Rhode Island
New York

New Jersey
Pennsylvania
Maryland
Virginia
North Carolina
South Carolina
Georgia
Florida
Ohio

Key People

Michigan
Bob Eddy, CEO

Parent

Lenard Green & CVC

Capital partners

Subsidiaries

Wellsley Farms
Berkely-Jenson
Richelieu Foods

Website

BJs.com



Giant Eagle



Giant Eagle (Western Pennsylvania English: /ˈdʒaɪn.ɪɡəl/)^[4] is an American supermarket chain with stores in Pennsylvania, Ohio, West Virginia, Indiana, and Maryland. The company was founded in 1918 in Pittsburgh, Pennsylvania, and incorporated on August 31, 1931.^[1] Supermarket News ranked Giant Eagle 21st on the "Top 75 North American Food Retailers" based on sales of \$ 10 billion.^[5] In 2005, it was the 32nd-largest privately held company, as determined by Forbes.^[6] Based on 2005 revenue, Giant Eagle is the 49th-largest retailer in the United States.^[7] As of Summer 2014, the company had approximately \$9.9 billion in annual sales. As of Summer 2021, Giant Eagle, Inc. had 480 stores across the portfolio. 216 supermarkets (Giant Eagle, Giant Eagle Express, Market District, Market District Express) and 264 fuel station/convenience stores under the GetGo banner.

Former	
name	Giant Eagle
Type	Private



HQ Location	Former name
Number of Locations	N/A
Areas Served	Private
Industry Type	Retail/Grocery
HQ Location	O'Hara Township, Pennsylvania, USA
Number of Locations	474
Supermarkets	216
GetGo	202
Rickers	56
Areas Served	Pennsylvania Ohio Indiana West Virginia Maryland
Key People	David Shapira Executive Chairman. Exec Chairman Laura Shapira Karet, CEO
Services	Convenience Gas Station Supermarket
Subsidiaries	GetGo RX-21 LLC



Ricker Oil Company, Inc.
Rini-Rego Supermarkets, Inc.
Seegrid Corporation
Website
<https://www.gianteagle.com>

Kings



The upscale market branded private label products under the Kings Own brand name.^[5]

During the COVID-19 pandemic in 2020, the market drew national attention for its policy on mask-wearing: when a customer entered the store without wearing a mask, they were given a mask and the CEO's phone number.^[6]

On August 23, 2020, Kings filed for bankruptcy^[7] and on October 14, 2020, it was announced that Albertsons submitted a winning \$96M bid for the company.

On December 7, 2020, Kings closed their location in Maplewood, New Jersey after being in Maplewood from 1942 to 2020.^[8] On the same day as the Maplewood location closed, Kings announced their locations in Long Hill, New Jersey and on River Street in Hoboken New Jersey will close.^{[9][10]} These locations closed in late December 2020.

On January 15, 2021, Kings announced that their locations in Bernardsville, New Jersey and in Warren Township, New Jersey will close.^[11] These locations closed on January 23, 2021. On February 23, 2021, Kings shuttered its location in Ridgewood, New Jersey.



Former name	Kingsfoodmarkets.com
Industry	Retail
Founding Date	1963
HQ Location	Parsippany, New Jersey, US
Number of Locations	19
Areas Served	Connecticut
Key People	
Parent	Albertsons
Subsidiaries	Balducci's Porricelli's food Mart Inc.
Website	Kingsfoodmarkets.com

Sprouts



Sprouts Farmers Market, Inc., is a supermarket chain headquartered in Phoenix, Arizona, US. The grocer offers a wide selection of natural and organic foods, including fresh produce, bulk foods, vitamins and supplements, packaged groceries, meat and seafood, deli, baked goods, dairy products, frozen foods, natural body care and household items. Sprouts employs more than 35,000 workers and operates more than 340 stores in 23 states.^[2] A typical store is around 30,000 square feet.^[3]



Former name	Sprouts Farmers Market
N/A	
Type	Public
Industry	Grocery store Health food store
HQ Location	Phoenix, Arizona, US
Number of Locations	340
Areas Served	Alabama Arizona California Colorado Delaware Florida Georgia Kansas Louisiana Maryland Missouri Nevada New Jersey New Mexico North Carolina Oklahoma Pennsylvania South Carolina Tennessee Texas Utah Virginia Washington
Key People	Jack Sinclair, CEO



Subsidiaries

Henry's Farmers Market
SUnflower Farmers
Market
SFM, LLC
Sprouts Farmers Markets
Holdings, LLC
sprouts.com

Website

Wakefern



Wakefern Food Corporation was founded in 1946 and is based in Keasbey, New Jersey, U.S It is the largest retailers' cooperative group of supermarkets and the fourth-largest cooperative of any kind in the United States. Wakefern was the largest private employer in New Jersey in 2018 (40,200 workers). As of 2021, Wakefern has fifty member companies who own and operate 362 supermarkets,¹ under



the brands of ShopRite, Price Rite Marketplace, The Fresh Grocer, Dearborn Market, Gourmet Garage, and Fairway Market in New Jersey, New York, Connecticut, Pennsylvania, Maryland, Delaware, Massachusetts, New Hampshire, Rhode Island, and Virginia

Former name	Shoprite Private Retailers
Type	Cooperative
Industry	retail
HQ Location	Keasbey, New Jersey, US
Number of Locations	362
Areas Served	New Jersey New York Connecticut Pennsylvania Maryland Delaware Massachusetts New Hampshire Rhode Island Virginia
Key People	Joseph S. Colalillo, CEO
Subsidiaries	Shoprite The Fresh Grocer PriceRite Fairway Market Dearborn Market Gourmet Garage



Website

www2.wakefern.com

Wegman's

Wegmans

Wegmans Food Markets, Inc., is a privately held American supermarket chain; it is headquartered in Gates, New York and was founded in 1916 in Rochester.

As of May 2021, Wegmans has 106 stores in the mid-Atlantic and Northeastern regions. The company has stores in New York, Pennsylvania, New Jersey, Maryland, Massachusetts, Virginia and North Carolina, with planned expansions into Delaware and the District of Columbia.

Wegmans has appeared on *Fortune's* annual "100 Best Companies to Work For" list since the list first appeared in 1998.¹ In 2020, the company was ranked at number three on that list, based on an employee survey of satisfaction. In March 2020, Wegmans announced partnership of its new Brooklyn store with Instacart to extend its reach to include all Manhattan ZIP codes. In July 2021, Wegmans announced it will launch the company's first Manhattan store in 2023. The store



will be at 770 Broadway, the site of the recently shuttered Astor Place Kmart.^[42]

Wegmans	
Former name	Rochester Fruit and Vegetable Company
Type	Private, Family Busienss
Industry	Retail Grocery
Founder	John Wegman Walter Wegman
HQ Location	Gates, New York
Number of Locations	106
Areas Served	New York Pennsylvania New Jersey Maryland Massachusetts Virginia North Carolina
Key People	Colleen Wegman, CEO
Colleen J Wegman	Nicole Wegman,Sr VP
Chairman	Danny Wegman
Services	Pharmacy Catering Coffee shop Restaurants
Number of Employees	50,000



Website

wegmans.com

Weis Markets

Weis Markets, Inc. /waɪz/ is a Mid-Atlantic food retailer based in Sunbury, Pennsylvania,^[4] It currently operates 196 stores with over 23,000 employees in Pennsylvania, Maryland, New York, New Jersey, West Virginia, Virginia, and Delaware.^[2] As of December 2017, The Weis family owns 65% of the company stock which has been listed on NYSE since 1965.

Weis faces significant competition from various food retail formats, including conventional retailers, mass merchant retailers, discount retailers, drug stores, convenience stores, Walmart and dollar stores. Weis's chief competition comes in its traditional home base of central Pennsylvania. Giant (Carlisle) (in some areas referred to as Martin's), a supermarket chain owned by Ahold, began aggressive expansion during the 1990s, building large stores with expanded selections. Giant/Martin's has remained the market leader throughout central and northeastern Pennsylvania. At Pennsylvania locations in Blair and Bedford counties, Weis directly competes with Pittsburgh-based Giant Eagle. Weis also faces tough competition in Lancaster County, Pennsylvania, from Hill. In the suburban Philadelphia area,



Weis competes with Giant (Carlisle), Acme, ShopRite, and Wegman's Maryland, Weis competes with Walmart, Acme, Food Lion, Wegmans, Harris Teeter, Safeway, ShopRite and Giant (Landover). In the Frederick area Weis also competes with Giant Eagle. In New Jersey, Weis's chief competition includes ShopRite, Stop & Shop and Acme. In New York, Weis's competition includes Price Chopper and Wegmans.

Type	Public
Industry	Retail grocery Harry and Sigmund
Founder	Weis
HQ Location	Sanbury, Pennsylvania
Number of Locations	196
Areas Served	Pennsylvania New York New Jersey West Virginia Virginia Delaware
Key People	Jonathan Weis, CEO/President
Number of Employees	23,000
Subsidiaries	Kings Dutch Valley Martins Farm Market
Website	www.weismarkets.com



Appendix B

Marketing and Sales Agencies

Acosta

Acosta sales organizations Acosta Sales & Marketing

Acosta is a full-service sales, marketing and service company in North America.^[2] Headquartered in Jacksonville, Florida, Acosta is a sales and marketing company for consumer-packaged goods (CPG) companies. Customers include Clorox and Coca-Cola, which have been clients since the 1930s and 1950s, respectively.

Gary Chartrand is the former company president Delmer Dallas recruited Gary Chartrand from the Carnation Company in 1983 and mentored him as a successor. Chartrand was named President in 1993 and CEO when Dallas retired in 1996. Two years later Chartrand was elected Chairman of the Board, and company acquisitions accelerated across the US and Canada.^[17] Chartrand believed the best way to protect Acosta was to expand coast-to-coast. Company expanded, it made strategic acquisitions and mergers which created immediate



penetration into new markets and significantly increased the company's client base.

Robert Hill has been with Acosta for 25 years. Gary Chartrand named Robert E. Hill Jr. as its President and CEO, effective January 1, 2009. Chartrand remained with the company as executive chairman of the board of directors. In 2011, Robert Hill made the Power 50 list by Supermarket News, which represents leaders among top retailers, wholesalers, manufacturers, associations and more.¹

Acosta's channels are: club, convenience, drug, e-commerce, electronics, foodservice, grocery, home improvement, mass merchandisers, military, natural/specialty foods, telecommunications, and value.

Founded	1927
Headquarters	<u>Jacksonville, Florida, USA</u>
Number of locations	110
Key people	Darian Pickett, CEO
Products	Outsourced headquarter sales, retail services, marketing services, strategic insights and business process solutions ^[buzzword] for consumer product manufacturers



Revenue	\$1.85 billion ^[1]
Number of employees	37,000
Website	www.acosta.com

Catalina Marketing Group

The **Catalina Marketing Corporation** is a public limited company under American law (Corporation), headquartered in Saint Petersburg, United States, which is for 25 years the world leader in targeted coupon distribution in commerce. The shares were listed on the New York Stock Exchange until February 10, 2007. Catalina Marketing had 1996 sales of \$ 134.2 million. Catalina Marketing has been owned by the Hellman & Friedman holding company since 2007 .

The Catalina system prints coupons based on the customer's actual buying behavior on a separate printer next to the checkout. Like all cash registers, the printers are connected to a separate PC in the store, which reads all transactions. If an EAN or a product group has been stored as a trigger for a coupon, the coupon is automatically printed out when this EAN is scanned and the cashier gives it to the customer.

In this way, the customer only receives offers that are relevant to him, which he can redeem for the next purchase in the same store (e.g. a buyer of baby diapers receives a coupon for baby food.) Through the



EAN codes of the products that are displayed via the checkout scanner are read, the purchasing behavior becomes recognizable. In this way, the coupons can reach the consumer more efficiently and the customers only receive the offers that are relevant to them. With its checkout couponing system, Catalina reaches over 310 million people worldwide, around 62 million of them in the European countries of Great Britain, France, Belgium, the Netherlands, Italy and Germany. Over 50,000 stores worldwide are connected. Every week around 500 million shopping carts are recorded worldwide.

Catalina Marketing Corporation	
<u>legal form</u>	<u>Corporation</u>
<u>founding</u>	1983
<u>Seat</u>	<u>Saint Petersburg , USA</u>
<u>management</u>	Jamie Egasti, Chief Executive Officer
<u>Number of employees</u>	1200 (2006)
<u>Website</u>	<u>www.catalinamarketing.com</u>

ESM Ferolie



C.A. Ferolie, prides themselves on maintaining strong traditions of excellence having provided their valued clients with tailored sales and marketing solutions since 1947. Their teams are enthusiastic, experienced and knowledgeable people who consistently exceed expectations. We are family owned and operated, giving us unparalleled flexibility to invest locally in talent and development that delivers industry leading results.

C.A. Ferolie is a locally focused agency operating in a regionally managed environment and, as a partner in a national network of agencies, can deliver professional services and access to all customers across all trade channels. They provide coverage throughout the entire North East and Mid-Atlantic Regions, west to Ohio and South into Florida. Our consortium of broker partners completes our national footprint.

The headquarter sales teams provide category analysis, trade promotion planning and selling services across all trade channels. Because there is no “one size fits all” strategy, we tailor our approach to assortment, pricing, merchandising and shelving at each account. With 80% of purchase decisions made in the store, executing the core elements of in-store merchandising is critical to success. Their in-store sales agents are equipped with our proprietary technology platform for real time insights as they identify merchandising opportunities, close voids, and execute shelf positioning strategies.

The Inner-City team members work in neighborhoods where they live so they understand the culture, language and priorities of their customers. This combination of strong customer relationships, advanced technology and associate expertise provides unparalleled store coverage and speed-to-shelf execution.

With over 70 years of experience in the industry, Their brands are built on the underpinnings of passionate purpose, exceptional service and best in class capabilities. They use data and insights to reach consumers



in new ways to target opportunities in all aisles for legacy, regional, and nationally recognized brands.

Management:

Antony J. Ferolie

Chief Executive Officer at ESM Ferolie

ESM Ferolie

Information Technology Manager

James L. Ferolie

Chief Information Officer at ESM Ferolie

Lawrence J. Ferolie

Chairperson

Paul Nadel

President

Sales offices

New Jersey (HQ)

2 Van Riper Road

Montvale, NJ 07645

201-949-2249

Mid-Atlantic

487 Devon Park Drive, Suite 210 Wayne, PA 19087

610-964-9566

New England

640 George Washington Highway Lincoln, RI 02865

401-312-1200

The Carolinas

11006 Rushmore Drive, Suite 150 Charlotte, NC 28277

704-527-5295



Upstate

455 Cayuga Road, Suite 500 Cheektowaga, NY 14225

716-631-3500

Pittsburgh

11676 Perry Highway, Suite 3301 Wexford, PA 15090

724-933-1951

Key Impact

Key Impact was formed in 2000, through the merger of Key Brokerage in New Jersey and Impact Sales in Maryland. Since then, Key Impact has grown and become known as the industry-leading foodservice sales and marketing agency in the United States! Key Impact represents Manufacturers of food, as well as packaging and supplies, and provides sales and marketing services to Distributors and Operators across all segments of the foodservice trade channel.

Key Impact continues to raise the bar in foodservice sales execution by investing in, adapting, and deploying cutting-edge technologies. Data sharing enables Key Impact to apply the analytics that drive decision-making and empower sales to create a strategic approach and an effective follow-through out on the street.

Management:

Neil Johnson

Chief Executive Officer

njohnson@kisales.com

Joe Hargadon

President & Chief Client Officer

jhargadon@kisales.com



Colin Quinn

Chief Financial Officer

cquinn@kisaales.com

Butch Cassidy

SVP, Corporate Distribution

bcassidy@kisaales.com

Carl Benkovich

Chief Operating Officer

cbenkovich@kisaales.com

Glenn Hayden

SVP, Field Sales

ghayden@kisaales.com

Appendix C

Brokers, Distributors and Importers:

C&S Wholesale Grocers

C&S Wholesale Grocers is an

American wholesale distributor of food and grocery store items with its headquarters in Keene, New Hampshire, United States. C&S is the tenth-largest privately held company in the United States, as listed by *Forbes*. C&S owns the Piggly Wiggly grocery brand (which is independently franchised to store operators) as well as the Best Yet private label brand. C&S is the largest wholesale grocery distributor in the United States, based on revenue.

C&S Wholesale Grocers, Inc. is an industry leader in supply chain solutions and wholesale grocery supply in the United States. Founded in 1918 as a supplier to independent grocery stores, C&S now services customers of all sizes, supplying more than 7,700 independent



supermarkets, chain stores, military bases and institutions with over 137,000 different products. We are an engaged corporate citizen, supporting causes that positively impact our communities.

C&S plays an integral role in serving our country's most important infrastructure. No matter where we spend our day — from the warehouse to the office — we help to feed our families, neighbors and communities. It's more than a job. It's a legacy.

C&S provides more than 140,000 stock-keeping units (SKUs) food and nonfood items to 6,500 corporate customers, including produce, meat, dairy products, delicatessen products, fresh/frozen bakery items, health and beauty aids, candy, and tobacco. C&S has 17,000 associates in 16 states, and storage space of more than 15 million square feet.

C&S customers include Giant-Carlisle, Giant-Landover, Stop & Shop, Safeway Inc., Winn-Dixie, Target Corporation, and independent store/supermarket owner/operators

Type	<u>Private</u>
Industry	<u>Grocery wholesale</u> and <u>distribution</u>
Founded	<u>Worcester, Massachusetts</u> (1918)
Founder	Israel Cohen and Abraham Siegel
Headquarters	<u>Keene, New Hampshire</u> , <u>United States</u>
Number of locations	over 50 distribution centers in 16 states



Key people

- Richard B. Cohen (Executive Chairman of the Board)
- Robert Palmer (Chief Executive Officer)

Revenue

\$30 billion (as of 2017)

Number of employees

about 17,000 (as of 2017)^[1]

Website

www.cswg.com

Footnotes / references

[1][2]



Gelbert Group

The Gelbert Global Group consists of many of the leading North American food importing companies, and has been involved in importing food products


for over 100 years. The Gelbert Global Group consists of many of the leading North American food importing companies, and has been involved in importing food products for over 100 years.

The combined revenues of the Group exceed \$1 billion. The combined resources of the Group companies provide strength in sourcing, insurance, finance, logistics, food safety and information technology. The Group supplies the needs of retailers, distributors, foodservice chains, hotels, cruise lines, and food manufacturers alike. The Group is also active in restaurant operations and non-food operations as well as real estate investments in the greater metropolitan NY area.

The family member companies of the Gelbert bring a board variety if imported food products to the food industry including:

- Canned and frozen fruits and vegetables
- Meats
- Seafood
- Imported, value-added and specialty cheeses
- Nuts and dried fruits
- Gourmet olive oils and vinegars
- Chocolates, natural fruit preserves and purées
- Soup bases, sauces and seasonings
-

Key people include:



George G. Gellert
Chairman of the Board

Andrew Gellert
President

Robert Gellert
Principal

Thomas Gellert
Principal

Amy Gellert Lebovitz
Principal

William Gellert
Managing Director

Josh Gellert
Managing Director

Procacci Brothers Sales Corporation

Delivering premium quality product to our customers starts with selective sourcing. Procacci Brothers works closely with small and large shippers in the U.S. and around the world to bridge the gap between grower and consumer. Our vendor partners rely on us to effectively bring their products to market. Long-standing relationships with growers, as well as our sales volume, allow us to pass along pricing values to our customers.

Vendors and customers have confidence in Procacci Brothers because of our mission, history of integrity, and our respected brands. Our customers know that Procacci Brothers is committed to providing the



best products at fair prices with attentive personalized service—all of which are vital to succeed in a fast-paced, competitive marketplace. Procacci Bros. Sales Corporation is located in Philadelphia, PA, United States and is part of the Grocery and Related Product Merchant Wholesalers Industry. Procacci Bros. Sales Corporation has 525 total employees across all of its locations and generates \$137.75 million in sales (USD). (Sales figure is modelled). There are 3 companies in the Procacci Bros. Sales Corporation corporate family.

They are located at:

3333 S Front St

Philadelphia, PA, United States, 19148

US

telephone +1 215-463-8000 and +1 215-467-1144

web address procaccibrothers.com




Appendix D Food Marketing department key personnel

John L. Stanton, Professor and Chairman

John L. Stanton has a Ph.D. in Quantitative Methods and Marketing from Syracuse University, and has been in the food industry for about 40 years. Dr. Stanton was elected to the European Retail Academy Hall of Fame, the Trade Promotion Optimization Institute Hall of Honor, and the Private Label Manufacturers Hall of Fame. Besides academia, Dr. Stanton has also worked in the food industry. He has consulted for many nationally known food companies including Campbell Soup Company, Procter & Gamble, Acme, Kroger, Pepsi, Frito Lay, Florida Dept. of Citrus, Kellogg and others.

Dr. Stanton regularly taught food marketing at the Alma Mater Studiorum - Università di Bologna. Dr. Stanton was awarded an honorary Degree from "Carol Davila" University of Medicine and Pharmacy for contribution to *Food, Nutrition and Health* and from the Romanian-American University for contributions to Global food marketing.

Dr. Stanton has spoken at many major US food association meetings and conferences including the National Pasta association, Dairy Management Inc. (DMI), International Mass Retailers Association, National Retail Federation, National Grocers Association (NGA), National Frozen Pizza Institute, Produce Marketing Association (PMA), Food Marketing Institute (FMI), National Association of Convenience stores (NACS), Institutional Food Distributors Association, Institute of Food technologists (IFT), National American Wholesale Grocers Association (now FDI), Snack Food Association, Private Label Manufacturers Association (PLMA), Produce Marketing Association,,




National Confectioners Association, Biscuit and Cracker Association, Indian River Citrus League, Refrigerated Foods Association, and many others.

He was a Board of Directors or Advisors of a number of food companies including Frankford Candy Company, Herr's Foods, Premio Foods, The Philadelphia Cheesesteak Company, David Michael flavor company and T-Pro, a trade promotion software company.

Dr. Stanton has also worked with many of the commodity agriculture groups including the Florida Department of Citrus, Mushroom Council, Sweet Corn Association, Dairy Management Inc, cranberry growers of Ocean Spray, and numerous farm groups. Dr. Stanton has served as an expert and expert witness to many food and beverage companies including Whole Foods, Target, Coca Cola, Monster Beverage, Ahold, Supervalu, Boars Head, Safeway and many others.

Dr. Stanton has spoken to food associations in International Speeches and seminars include Mexico (ANTAD) Russia (Russian Fruit Juice Federation) Germany (Tengelmann, German Chocolate Association, European Fruit Juice Association), France (Monoprix), Argentina (Argentine Grocery Association, Denmark (AC Nielsen conference), Uruguay (Agri-business Congress), Taiwan (National Quality conference), Japan (Dairy convention), Singapore (Retail leadership conference), Sri Lanka (CMS), Brazil (ABRAS, APAS, HSM World Marketing Seminars), Italy (Deutsche Bank Venice conference), Poland (Posnan university program), Thailand (Fresh Food Association), Norway (AC Nielsen conference), Chile (Chilean Grocers Association), Sweden (AC Nielsen conference), Colombian (Colombia Grocers Association), Romania (RAU), Costa Rica (IICA), New Zealand (Food and Beverage Association), Finland (AC Nielsen conference), Ireland (Northern Irish Food and Beverage Assoc., Musgrave), Czech Republic (USDA Food Show), and Estonia (Talinvest, US Embassy).




Dr. Stanton has been regularly quoted in the media. He was interviewed on Fox Business, CNN, the Today Show and was interviewed on NBC Nightly News with Tom Brokaw as well as numerous local channels. He has been quoted in most of the food marketing magazines, as well as in the print media, and has been quoted in *Forbes*, *Fortune*, *Advertising Age*, *Brand Week*, *New York Times*, *Wall Street Journal*, and many others. He hosted an episode of the History Channel's Modern Marvels entitled, "The History of the Supermarket" and appeared in a movie documentary called Sustainable (<http://youtu.be/WjjnrsrytZY>)

Dr. Stanton has written 13 books including *Food Marketing Perspectives: Opinions and Views*, *Winning Marketing Strategy*, *Simple Solutions To Making Customers Feel Like Your Supermarket Is Their Supermarket*, *Precision Target Marketing* MORE Stanton on Food Marketing, *Stanton on Food Marketing*, *Success Leaves Clues!*, *Delight Me...The Ten Commandments of Customer Service*, *21 Trends in Food Marketing for the 21st Century*, *325 Ways to Make Customers Feel Like Your Supermarket Is Their Supermarket*, *Marketing Planning in a Total Quality Environment*, *Running a Supermarket Consumer Focus Groups* and *Making Niche Marketing Work* (McGraw-Hill). The niche book was selected for the Business Week Book Club, and has been published in German, Portuguese, Thai, Hebrew, and Korean. Dr. Stanton is currently the editor of the *Journal of Food Products Marketing*, and an editorial advisor of the *British Food Journal*.

George Latella

George has taught Food Marketing at Saint Joseph's University for 30 years. He has received three Teaching Excellence awards and was voted the best Professor in the Haub School of Business in 2016 by students.



He has conducted numerous U.S. study tours for International Scholars through the USDA and has also led the Senior Leadership of Ferrero Germany on facilitated tours. He has also done seminars for the NASFT regarding selling your products into specialty stores.


He brings 35+ years of Sales/Marketing executive experience with Tastykake & his consulting into the classroom. Key positions at Tastykake included: Director of Key Accounts, Director of National Sales/New Business Development, Director of Customer Relations/E-Commerce, & Director of Marketing.

Outside of SJU, he consults for Beacon Marketing Group which provides strategic solutions for companies through planning, marketing communications, direct marketing, E-commerce, and quantitative research.

He also is a partner in the Italian themed Bria & Latella's Italian Deli & Kitchen, a family business that has survived & thrived through the Covid pandemic. As part of this, he developed a series of webinars on how to start your own food business during the covid pandemic.

Ferdinand Wirth Associate Professor in Food Marketing

Ferdinand Wirth, Professor of Food Marketing, has a Ph.D. in Agricultural Economics from Louisiana State University he joined the SJU faculty in 2008 after spending ten years as a University of Florida faculty member. He has more than 20 years of marketing experience in industry and government, including service as the Administrator of Agricultural Marketing and Development for the Delaware Department of Agriculture. Dr. Wirth teaches strategic marketing management, new product development, and strategy/tactics of pricing at the undergraduate and graduate levels.



Dr. Wirth is an applied behavioral marketing economist. The focus of his research program has been to provide market intelligence and support for agricultural producer groups and agribusinesses by identifying changes and opportunities in the marketplace that could mean greatly improved sales and profits, or in some instances, the very survival or failure of agribusinesses. Dr. Wirth's research program has generated more than \$1.3 million in external funding, a book chapter, 29 refereed journal articles, 28 non-refereed publications, 72 invited and selected presentations at professional meetings, and 32 presentations to agribusiness associations and community organizations. Dr. Wirth's consulting activities include performing USDA-funded pasta marketing workshops on strategy and new product development in South America to promote sales of U.S. wheat.

Ernest Baskin, Associate Professor of Food Marketing

Dr Baskin has a Ph.D. in Marketing from Yale University School of Management. He also holds a Masters of Arts in Marketing and a Masters of Philosophy in Marketing from the Yale University School of Management. He also holds a Bachelor's of Science in Economics from the Wharton School at the University of Pennsylvania. Dr. Ernest Baskin is an expert in consumer behavior and marketing research. His research focuses on consumer judgment and decision making with a particular interest in consumption decisions. Dr. Ernest Baskin has also written a number of business cases on topics such as the use of stunt foods in marketing as well as the Amazon-Whole Foods Merger. These cases consistently rank in the top 5 downloaded cases on Sage Business Cases. He is also on the editorial board of Sage Business Cases and is serving as the Editor of a Food Marketing case series.



He has been extensively covered in the popular press in outlets ranging from print sources such as the Chicago Tribune, NY Times, Philadelphia Inquirer, CNNMoney, Wall Street, Journal, Food Network Magazine, USA Today, and the Atlantic.. He is often a featured expert on both television and radio interviewed on shows such as NBC News, NPR and others on topics in the food industry ranging from the sweetened beverage tax to retailing trends to the Amazon-Whole Foods merger. Dr. Ernest Baskin e has worked with major industry organizations such as the Specialty Foods Association, Veal Checkoff, FMI, and others. He has also worked with major retailers (such as Shoprite, 99 Cents Only, Ahold, Walmart, amongst others), startups in the industry (Chefs Who Cook, Finger Licking Dutch, amongst others), food service providers(Sodexo, Google Food Team, Red Lobster, amongst others), and major CPG manufacturers(Pepsico, Unilever, amongst others).