

# Food Policy in the 116th Congress

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**THE VOICE OF FOOD RETAIL**

Feeding Families  Enriching Lives

# FMI PROUDLY ADVOCATES ON BEHALF OF THE FOOD RETAIL INDUSTRY

- FMI conducts programs in public affairs, food safety, research, education and industry relations on behalf of its almost 1,000 food retail and wholesale member companies in the U.S. and around the world.
- FMI membership covers the spectrum of diverse venues where food is sold.

More than  
**33,000**  
retail food  
stores

Regional  
firms

**\$770**  
**billion**  
combined annual  
sales volume

**Almost**  
**500**  
associate members  
that include retail  
**supplier**  
**partners**

Independent  
operations

Multi-  
store  
chains

Online food  
retailers,  
pharmacies

**85**  
international  
companies



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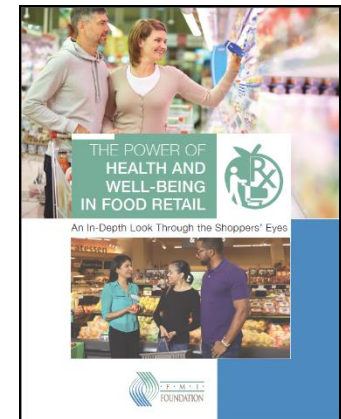
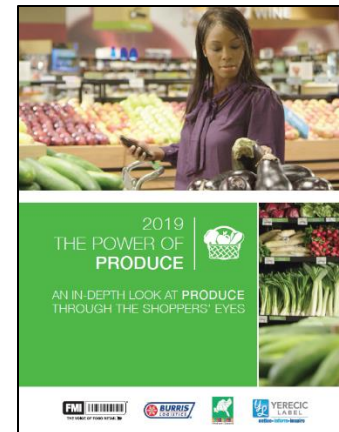
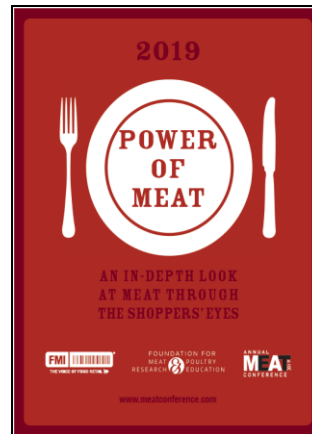
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# The Power of Research



## Research

Our industry research looks at all aspects of the food retail industry from shopper trends to business operations to provide insightful, relevant and current research.





# Industry Trends



FMI's signature research report, *U.S. Grocery Shopper Trends*, 1977

# Overview of 2018 *U.S. Grocery Shopper Trends* findings

## 2017

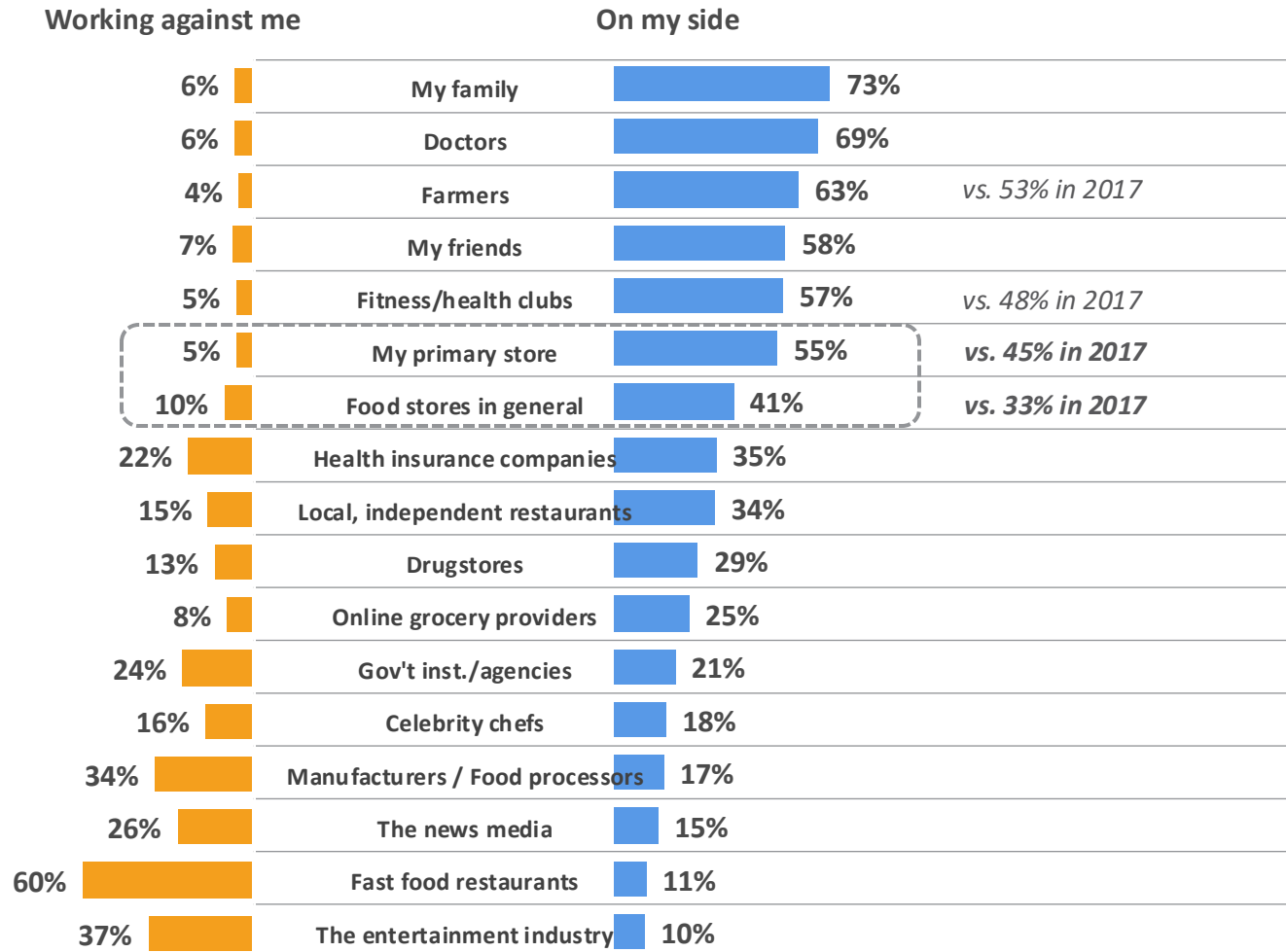
- Channel fragmentation continues, with ecommerce gaining users
- Transparency means context beyond the package
- Food retailers are increasingly well-positioned for shopper wellness

## 2018

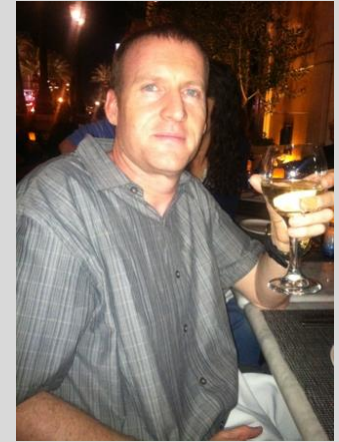
- Online has evolved from a grocery channel to a grocery touchpoint
  - *Older shoppers are adopting and younger shoppers are discovering a future that differs from industry assumptions*
- Shoppers evaluate a food retailer by how well it supports their overarching goal of eating well
  - *Individualized and grounded in occasions, eating well includes diverse objectives around taste and enjoyment, health and connection*
- Shoppers trust in their food stores to support their wellness more than ever, even as they rely on a wider variety of stores in order to shop well
  - *Grocery stores increasingly must fulfill a diversity of food experiences, with strategic opportunities to align in-store and digital touchpoints to enhance choice, enjoyment and personal connection*

# More than ever, shoppers see primary stores as allies

When it comes to helping me stay healthy, these people and institutions are...



## Primary Grocery Stores Are an Important Ally



*"My main store is the number one place I learn about food. They have department experts and demonstrations and classes. To me, it's a whole experience."*

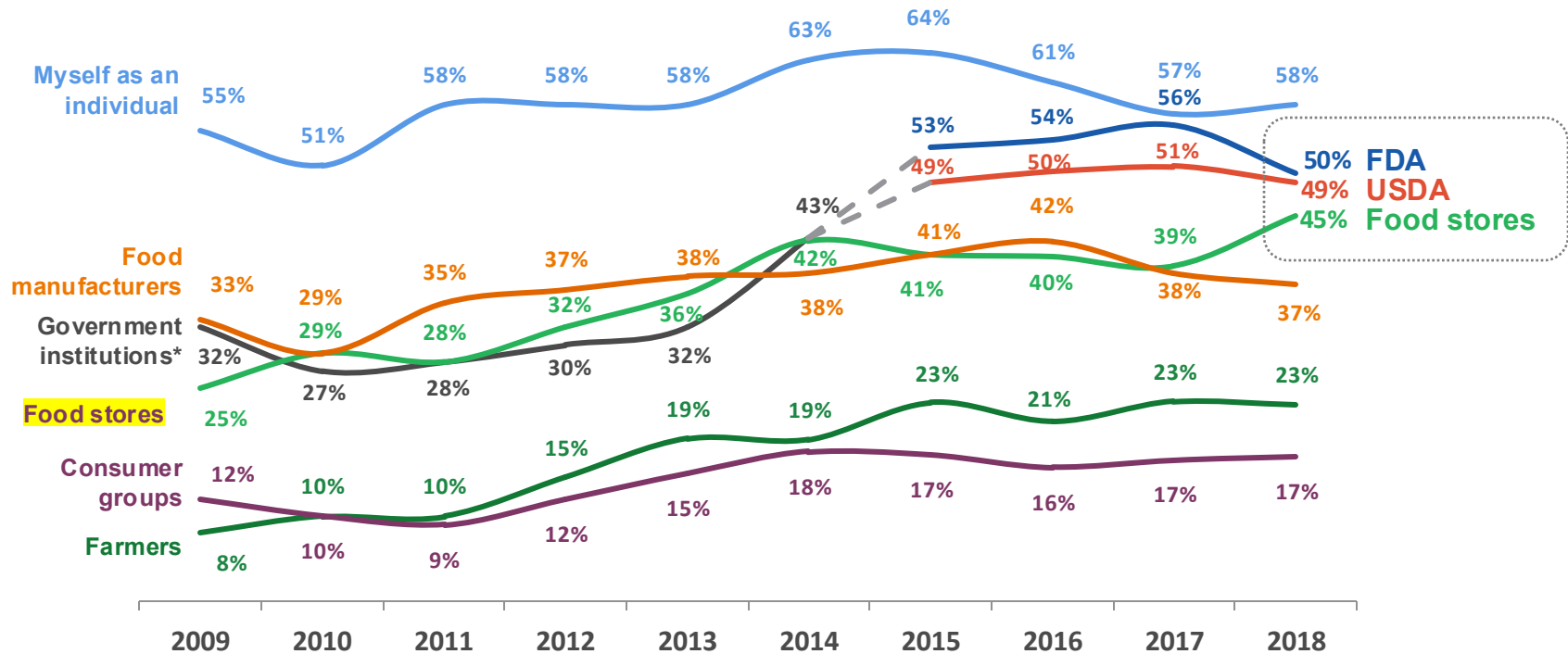
— David, 45

# Trust in retailers to provide safe food is at a 10-year high

93%

"TRUST [their] grocery store to ensure that the food [they] purchase is *SAFE*"

## ENTITIES CONSUMERS RELY ON TO ENSURE FOOD BOUGHT AT GROCERY IS SAFE





# How we eat and shop has become more complex; The changing demands of “eating well.”

**Sustenance and  
eating enough**



**Healthy and  
nutritious**



**Enjoyment, discovery  
and mindful connection**



**Back then**



**Not long ago**



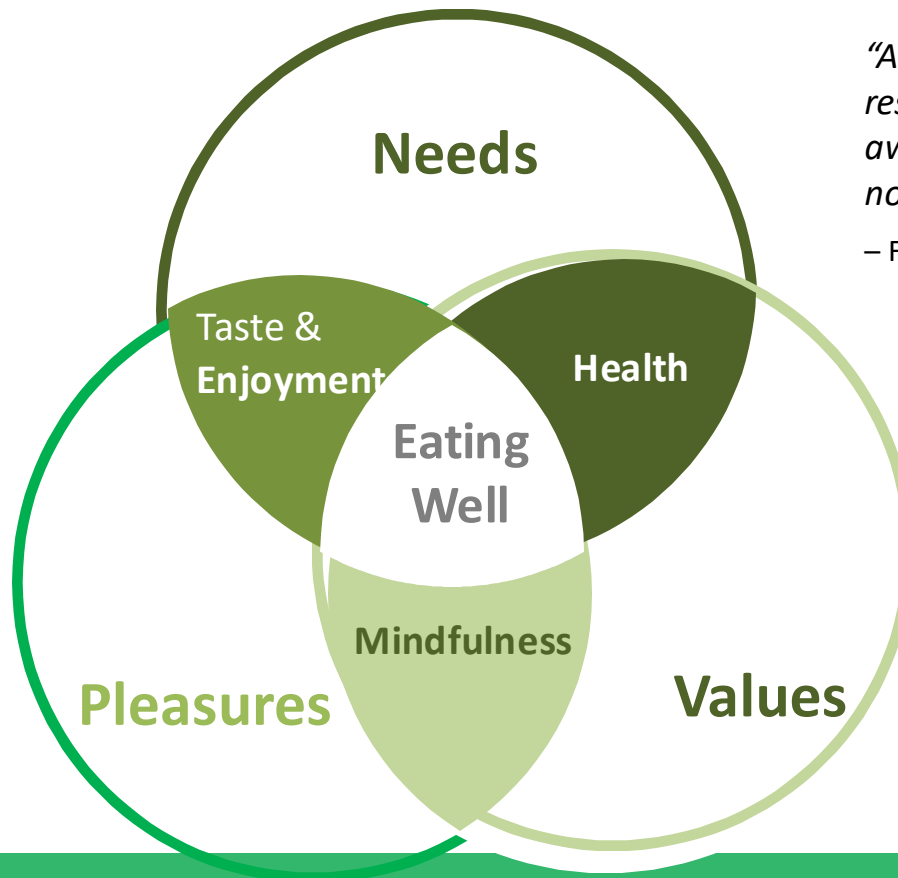
**Today**



# The notion of eating well now comprises a balance of multifaceted needs, pleasures & values

Health is an anchor but is joined by desires for taste, enjoyment, and discovery alongside the prerequisites of cost and convenience.

*“Eating well is about the diversity of foods – diversity of ingredients, diversity of preparations. I like to know the provenance of the food, what varietal it is. Exploring geographies and other communities and history.”*  
– Stephanie, 33



*“A balanced diet. Something non-restrictive but containing an awareness of the healthy versus non-healthy food items.”*

– Female, 23

*“Sustainability and ethics is a bonus in terms of what motivates me to buy, but it is built into the USDA Organic seal. Ethical treatment and the environment goes hand in hand with it.”*

– David, 45

Thank you. Questions?