

Supporting Healthy Aging Across the Lifespan – The Role of the Food Industry

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What Constitutes the “Food Industry”?

Commodity producers – Farm Fresh (organic)

- Meat, Poultry, Dairy, Seafood
- Vegetables, Fruits, Grains, local farmers' markets

Processed/Packaged Foods

- Components for meals (breakfast cereal, pasta, side dishes)
- Sauces, spreads, dressings, condiments
- Yogurt, cheese, deli meats
- Ingredient suppliers

Composite meals

- Multi-component entrees, pizza, hand-held

Snacks, Desserts

- Salty snacks, nuts, confections, baked and frozen desserts

Beverages

- Soft drinks, water, tea, coffee, juices, alcoholic beverages
- Sports drinks, energy drinks, fortified beverages

What Constitutes the “Food Industry”?

Specially formulated nutritional products

- Portion-controlled meal replacements (liquid/powder)
- Infant formula, food for special dietary use, medical food, oral rehydration solutions
- Limit/omit nutrients/components (fat, trans fat, total/added sugar, gluten, allergens)

Dietary Supplements (vitamins/minerals, bioactives)

Restaurants

- QSR, Sit-down, take-away (including in super markets)

Food Service

- Hospitals, Schools, prisons
- Cafeterias, workplace food service
- Vending
- Specialty online DTC services (Blue Apron)

Government Program Suppliers

- School Lunch
- SNAP/WIC
- Military

Grocery Manufacturers of America



HEALTHY AND AFFORDABLE CHOICES

We're here to share the food news

to know; for us *Every Day is Food Day*

Americans need

We Provide Safe, Healthy, Convenient and Affordable Food Choices that Work for Everyone

America's food and beverage companies have a strong commitment to providing consumers with the products, tools and information they need to achieve and maintain a healthy diet. Obesity is a serious public health problem. Everyone – industry, government, schools, parents, employers, communities and non-governmental organizations – must do their part if we are going to meet First Lady Michelle Obama's goal of solving childhood obesity within a generation. GMA and its member companies enthusiastically support the First Lady's goal and are doing our part to empower consumers to live healthy and active lifestyles.

THE FACTS

⇒ We don't just make food; we make time for families.

- In 1900, the average American woman spent seven hours a day cooking and cleaning up from cooking for her family. Today, moms spend just over an hour a day cooking for their families, thanks in large part to industry's commitment to innovation. Since 1961, we've saved moms 18 days a year in food prep time.
- Today the average American family spends less than 6 percent of their income on food, compared to nearly 14 percent in 1961.

⇒ We are providing safe, healthy and affordable food.

- America has the safest food supply in the world and it has never been easier to eat healthy.
- The average American spends less than 6 percent (5.5 percent in 2010) of their income on food, which is less than half of what they spent 50 years ago (13.6 percent in 1961), thanks in large part to the food and beverage industry's culture of continuous improvement and innovation.
- Our industry offers consumers more product choices than ever before. In 1949, the average grocery store carried 3,750 product choices. In 1965, that number grew to 7,300 and ballooned to 14,145 by 1980. Today, the average store carries nearly 39,000 different product choices for consumers to choose from.

⇒ We are providing more of the healthier product choices consumers want than ever before.

- Since 2002, food and beverage companies have given consumers more than 20,000 healthier product choices that have fewer calories and reduced fat, sugar and sodium.



- Through the Healthy Weight Commitment Foundation, food and beverage manufacturers are removing 1.5 trillion calories from the food supply by 2015.
- America's food and beverage companies and retailers developed *Facts Up Front*, a front-of-pack nutrition labeling initiative to help busy consumers, especially parents, make informed choices while they shop. *Facts Up Front* is the most significant reform of food labels in 20 years and is being supported with a \$50 million consumer education campaign.
- In addition to offering healthier products, food and beverage companies spend more than \$130 million per year in nutrition and health-related activities and grants to communities across the country.

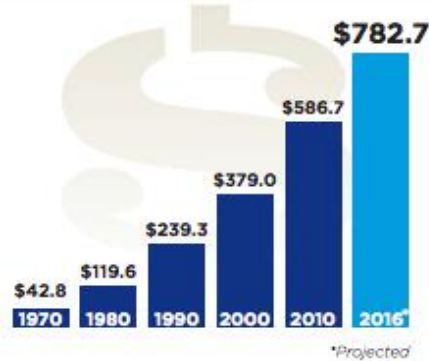


Restaurant Industry has huge impact

RESTAURANT INDUSTRY SALES (\$B)

2016 Industry Sales Projection

Commercial Restaurant Services	\$720.4
Eating Places	\$536.2
Bars and Taverns	\$19.9
Managed Services	\$50.9
Lodging Places	\$39.0
Retail, Vending, Recreation, Mobile	\$74.4
Noncommercial Restaurant Services	\$59.6
Military Restaurant Services	\$2.6



RESTAURANT INDUSTRY EMPLOYMENT



LOCATIONS: 1 million+

RESTAURANT INDUSTRY SHARE OF THE FOOD \$



CONSUMER TRENDS BY THE NUMBERS

66% Consumers who eat a wider variety of ethnic cuisines now than they did five years ago.

80% Consumers who eat at least one international cuisine per month.

75% Smartphone users who view restaurant menus on their phones at least a few times per year.

68% Consumers who are more likely to visit a restaurant that offers locally produced food items.

72% Consumers who say restaurant technology increases convenience.

39% Smartphone users who would pay restaurant and bar tabs via smartphone app if offered.

60% Consumers who are more likely to choose a restaurant that offers eco-friendly food.

37% Consumers who say technology makes them dine out or order takeout or delivery more often.

61% Consumers who would be likely to order delivery from a tableservice restaurant if offered.

70% Consumers who order more healthful options at restaurants than they did two years ago.

42% Consumers who say technology makes restaurant visits and ordering more complicated.

31% Consumers who would be receptive to text message marketing from a limited-service restaurant.

What drivers impact the food industry?

Consumer demand, ongoing satisfaction = repeat sales

Diversity of product offerings

- Life stage appropriate, meal occasions
- Balancing familiarity, comfort, taste, convenience, and cost, with variety, ethnicity, and availability

Regulatory guidelines on marketing, communications, nutrition labeling, claims

Overarching commitment to safety, quality, and efficiency to reduce manufacturing costs

Increasing commitment to sustainable practices across the entire supply chain

Nutritional Support for Healthy Aging by the Food Industry Requires:

- Compelling research outcomes with practical applications
- Translational innovation with suppliers to develop products and/or programs consistent with research
- New tools to identify and target susceptible individuals for personalized recommendations to promote “their” healthy aging
- A cooperative and collaborative regulatory agency to approve validated claims for products, when appropriate data is provided
- Endorsement of nutritional concepts by physicians and regulators when shown to be therapeutic for patients
- Effective use of social media and technology to bring positive health improvement messages to consumers and their influencers

Consumers need to know when a product is formulated to meet a need

- Health Claims for reducing risk of chronic disease
 - Qualified Health Claims
- Food industry has made significant progress in:
 - Reducing sugar, fat, calories and eliminating trans fat
 - Adding fiber, mainly through whole grains being predominant flour, also soluble fiber in drinks
 - Increasing protein, n-3 fatty acids, probiotics, iron, antioxidant vitamins
 - Breakthrough work in infant development leading to qualified HC to reduce cow's milk allergy
 - Medical Foods for patients unable to consume normal food

Food Industry Also Partners with others for greater impact



The Healthy Weight Commitment Foundation (HWCF) is changing the national and global dialogue about obesity by providing information and a support system that families can use to make real changes that will lead to a healthy lifestyle and collectively help roll back obesity rates in the U.S. and around the world.

- Cumulatively, we have reached more than 2.9 billion children and adults with positive health messages and information since 2009.
- Our award-winning school curriculum has reached 36.1 million American Pre-K—Grade 5 children.
- Through Smart from the Start, HWCF has reached 10% of American preschool children living in poverty.

In recent studies, obesity rates among U.S. children aged 2-5 have plateaued and receded. American families are getting the healthy lifestyle message—in part thanks to the innovative work of the HWCF and its 300+ partners.

Increasing the Availability of Lower Calorie Food and Beverage Choices

Making marketplace changes that increase the availability of lower-calorie food and beverage choices is a top priority for the Healthy Weight Commitment Foundation. The Foundation's food and beverage company members have removed 6.4 trillion calories from the food supply by changing the recipes of existing products, introducing new lower-calorie products, and providing single-serve options. This significant accomplishment was evaluated and independently verified by the Robert Wood Johnson Foundation and received an award from the Partnership for a Healthier America, chaired by First Lady Michelle Obama.

1.5
Trillion
Calories

Calorie
Commitment

6.4
Trillion
Calories

Actual Calorie
Reduction

Summary: What can the food industry do?

1. Promote/support best research establishing links between nutrition and healthy aging at all stages of life
2. Develop and market products consistent with nutritional recommendations
3. Collaborate with regulatory agencies on effective ways to communicate value of products
4. Partner with industry, scientific, academic, government organizations to inform/educate public and medical community about nutrition's vital role in promoting healthy aging