

# FOODLINK



# U.S.

THE BI-MONTHLY NEWSLETTER FOR IMPORTERS OF U.S. FOODS

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## PACK MENTALITY

**Manufacturers are piling on new pet foods that focus on natural ingredients and innovative packaging.**

**M**any consumers these days are feeding their furry friends even better than they feed themselves. Natural, functional, and healthy are three key factors driving pet food sales in the United States today—a direct result of the “humanization” trend that has steadily built momentum over the past few years.

The trend is playing out in other countries, too—albeit on a smaller scale—as pet ownership increases. In China, for instance, the fast-paced economy and increasing levels of disposable incomes are having a positive impact on the pet industry, according to Euromonitor International.

Dogs are clearly ahead of the pack in winning consumers’ hearts, at least in the U.S. market: They account for three-fifths of total pet food sales, according to “Pet Food in the U.S.,” a recently released study from New

York, New York-based market research firm Packaged Facts. The cat category is second, snagging approximately one-third (34%) of pet food sales, while other pet food, which includes products for fish, reptiles, and small animals, makes up 6%.

Among retail channels selling pet food, mass merchandisers have solidified their lead in market share, according to Packaged Facts. The channel claimed 34% of U.S. category sales in 2005. Mass merchandisers as a group have increased their market share by several percentage points since 2001. Most of that gain has come at the expense of supermarkets, which have continued to lose share and are now holding just 26% of sales.

Leading the mass charge, both Wal-Mart and Target have identified pet supplies as a key growth category, and the two have instituted aggressive strategies that include revamping in-store departments, introducing new upscale private label products, and, in

the case of Wal-Mart, launching a major online initiative.

Pet specialty stores, including PetSmart and Petco, account for 25% of the business, with the “other” retail-sector channel garnering the balance.

### DOG EAT DOG

Packaged Facts estimates that U.S. retail sales of dog food totaled approximately \$8.7 billion in 2005, up from \$6.8 billion in 2001. Viewing ongoing product upscaling as the primary market driver, the firm forecasts annual gains averaging 6.1% through 2010.

Key product trends in dog food are underscored by the top 10 package tag claims seen during the first six months of 2006. Appearing on the highest number of new products is the tag “upscale” (75), followed by “natural” (71) and “high vitamins” (42).

Health-related products continue to spearhead the premium product thrust, generally slotting into three groups: natural/organic, functional/nutrient-enhanced, and special diet (segmented by lifestage, weight, health condition, breed, etc.). These three appeals can be seen across all dog food types (dry, wet, biscuits/treats), and they’re increasingly overlapping as marketers continue to up the health-oriented premium product ante.

At the forefront of the premium product trend are natural and organic products, whose sales are expected to far outpace those in the overall pet food market. Packaged Facts projects that sales of natural pet food will top the \$1 billion mark by 2010, with the organic segment approaching \$100 million.

The other contributor to strong premium sales will be the subcategory of functional pet

*continued*

PACK MENTALITY *continued*

foods, especially those positioning on preventive and therapeutic health care, and with increasingly targeted benefits.

The aging pet population virtually guarantees strong ongoing demand for senior-focused products, including those boasting novel ingredients like glucosamine, MSM, chondroitin, omega fatty acids, DHA, and probiotics, with key appeals including

increased longevity, reduced joint pain, healthy skin and coat, hairball control, increased vitality and alertness, and improved urinary and digestive health.

Weight loss/maintenance products will also continue to make inroads, as will products positioned on oral care.

**PACKAGING TRENDS**

The other key prong of the ongoing trend toward “product premiumization”

will be packaging, especially products boasting human-style containers and enhanced convenience.

Many of the major trends in convenience foods for humans involve new product and packaging formats and sizes that are already being seen in the pet food market: disposable, single-serve containers or peel-off-top pudding-style plastic cups; single-serve pouches that promise easy serving and locked-in freshness and flavor; resealable packages of all kinds; and easy-open, pull-tab cans.

By putting products in more convenient packages, marketers not only satisfy consumer demand, they also benefit from higher retail prices and margins, as do the retailers who carry the products.

**CAT SCRATCH FEVER**

Packaged Facts estimates that U.S. retail sales of cat food totaled approximately \$4.9 billion in 2005, up from \$4.1 billion in 2001. The firm forecasts annual gains averaging 5.1% through 2010, bringing cat food sales to \$6.3 billion.

As in the dog food category, “upscale” was the No. 1 package tag on cat food products introduced from January to June 2006, with 23 of the entries bearing this claim. The No. 2 claim, “natural,” appeared on 19 products, with related claims including “real,” “no preservatives,” “fresh,” “no artificial flavor,” and “organic” also ranking among the top 10 claims. In addition, two functional/fortified claims—“high vitamins” and “high minerals”—also made the top 10 list, collectively appearing on 20 new products during the first six months of 2006.

Variety and gourmet flavors continue to define new products and marketing initiatives in the cat food market, with products increasingly trending toward more human-style fare. Also, as in the dog food segment, natural and organic cat food continues to be mainly the domain of pet specialty marketers; however, mass marketers are now beginning to tap into this trend. In addition, special diet foods, including indoor formula, hairball control, weight loss, and senior products, have all staked out a firm presence in the cat food market. ★

**For more information**

The entire 395-page report is available at the Packaged Facts Web site, [www.packagedfacts.com](http://www.packagedfacts.com).

**Flying high**

**Airport dining worldwide has come of age in the last decade.**

In the early 1990s, airport terminals began filling up with chain restaurants and other amenities, as air travel became more affordable. Then, after the unprecedented events of Sept. 11, 2001, passengers had to endure longer waiting times due to increased security—setting up another need for more foodservice options.

Now airport managers are working with an array of restaurant operators, many of them local, to broaden their dining horizons. Chicago’s O’Hare Airport, for example, which bills itself as the world’s busiest, features the Berghoff Café, a sibling of Chicago’s famous Loop restaurant, in Terminal 3.

OTG Management is a U.S. foodservice operator that has sought out trendy concepts for its various national airport locations. At New



York’s JFK Airport, for instance, the company tapped Deep Blue Sushi (pictured above) for the JetBlue terminal. The restaurant’s upscale design includes stainless steel work tops and blue patterned glass eating counters.

London’s Heathrow Airport, which, like Chicago’s O’Hare, claims to be the world’s busiest, has evolving bars and restaurants featuring brand names from around the world, as well as England’s best. There is coffee Italian-style at Costa Coffee; traditional English fare at the Tap & Spile, Shakespeare Ale House, or J.D. Wetherspoon; and classic

French at Chez Gerard, just to name a few.

Airport manager Kenneth Guldbjerg attributes the growth in foodservice options to several factors. “Low-cost flights are an important factor contributing to the growth,” he says. “When people travel on low-cost flights, free in-flight meals have been cut away, so passengers often choose to eat at the airport instead. In addition, we see a clear trend that passengers then decide to treat themselves, for instance to a good meal, since the ticket was so cheap.”

There’s certainly no shortage of good meals at Australia’s Brisbane Airport. The international terminal alone boasts Arrivals Café, Brisbane institution Aromas and an Aromas Express, the famous chicken-and-chips Red Rooster, a Luscious Juice Bar, Velluto Espresso & Wine Bar, Brasserie, BLD (Breakfast Lunch

Dinner), and Eagle Boys Pizza.

As might be expected, Paris Orly Airport is a gastronomic bonanza for travelers. On the mezzanine level of Orly West there is the Clifden Irish Pub, Le Trefle, and the more upscale Maxim’s, an offspring of the famous Parisian restaurant of the same name. Orly South has Le Clos St-Germain, a gourmet restaurant, and several less formal venues.

Further east in Bangkok, Thailand, Suvarnabhumi Airport features 50 dining venues—30 with seating areas, and six that are proper dining restaurants. ★

# POINTS OF DISTINCTION

**Giant Eagle's Market District sells food experiences with its own style.**

**G**iant Eagle, a grocery market leader in western Pennsylvania that operates 200-plus conventional supermarkets, has been industriously fine-tuning its strategic game.

There's plenty to admire in the merchandising approach of its two new Market District stores, both located in Giant Eagle's hometown of Pittsburgh. One is a 68,000-square-footer, situated in Pittsburgh's urbane and diverse Shadyside neighborhood. Its considerably larger, though no less unique, sibling is the 117,000-square-foot Market District in the more affluent South Hills suburb of Bethel Park.

The new format, which was spearheaded by senior vice president Kevin Srigley, simultaneously hits the bull's eye as both a culinary destination for food aficionados and as an ideal setting for shoppers' customary household shopping needs.

"In a single location, customers can purchase unique, fresh, and specialty items alongside mainstream national brands," points out Srigley, "while enjoying convenience-oriented services such as pharmacy, photo development, and dry cleaning."

Fresh foods are unmistakably its main focal point. The wide array of fresh foods includes many from its own impressive 5,000-square-foot on-site kitchen.

"Food has become so fashionable," says Srigley, citing the number of culinary-related TV shows and celebrity chefs. "Food has taken on a whole new dimension for people. This store was really designed to cater to people as a destination unlike any other in the marketplace."

The South Hills location is staffed by a contingent of some 500 associates who have undergone extensive training. More than 50 chefs, bakers, and other food professionals are on hand throughout the store to share their knowledge.

The unexpected is a specialty at the Village Square Market District. For one thing, it houses an authentic Brazilian-

style churrasco, offering fresh meats, seafood, and vegetables spit-roasted over an open flame and carved to order. The store also features a charcuterie showcasing domestic and imported cured meats from countries such as Italy and Spain.

The special and unusual extends to in-store bakery as well, which counts a Bongard hearth oven from France among its equipment. The bakery, which uses traditional scratch baking methods, is positioned front and center in the marketplace.

A striking coffee roaster, which cranks out fresh-to-order drinks on-site, beckons customers toward a tempting medley of hot and cold beverages served up by baristas at the coffee and juice bar.

Customers can also quench their thirsts with a seemingly limitless array of single-serve beverages housed within a 40-foot refrigerated case, adjacent to which is a pizza and sandwich station. Made-from-scratch pizza dough renders traditional and gourmet pies such as the signature hot Italian hoagie pizza. The sandwich menu, meanwhile, boasts a rotating selection of hot-carved sandwiches with choices like pork loin, roast beef, and hot sausage.

## CUSTOM-MADE ENTREES

Customization also applies to the fresh pasta made on-site and dried fresh daily, in traditional varieties like spinach and herb. After picking their own pasta, shoppers can pair it up with fresh sauces from a list including Spicy Sun-Dried Tomato, Alfredo, and Mediterranean. Authentic ravioli is also on the menu, along with a delicious supply of fresh mozzarella that's handcrafted in the store—truly an unusual art in any retail setting, let alone a supermarket.

Just a few feet away from the entree and appetizer selections is the Cheese Shop, an 800-square-foot showstopper that offers hundreds of imported and artisan cheeses, with aged varieties housed in a state-of-the-art walk-in cheese cave.



Meanwhile an extensive and attractive prepared foods lineup is sure to find shoppers concluding that convenience never tasted so good. At Market District they can choose from an assortment of ready-to-eat traditional, ethnic, and comfort-food favorites—entrees, side dishes, salads, and small plates, all made on-site fresh each day. Customers can also visit the fresh sushi and salsa bars, or create their own salads from an extensive salad bar featuring gourmet greens and vegetables, homemade dressings, and unique prepared salads.

## COSMOPOLITAN DINING

All of the many choices can be consumed in a spacious Cosmopolitan Café, which offers Wi-Fi connectivity. Adjacent to it are an enclosed patio for al fresco eating and a community meeting room.

The catering to specialized tastes and needs continues with another key aspect of the Market District emporium: a 500-item kosher grocery section and authentic deli. The deli, which has its own kitchen, was designed with help of rabbis. It offers a variety of popular brands like Kedem and Aaron's, as well as Tnuva and other popular Israeli favorites.

Variety characterizes the format's offering of natural and organic items, which stands at more than 4,000 natural, organic, and gluten-free products. An extensive produce department merchandises more than 500 varieties, including unusual selections such as cipollini onions, cactus pears, exotic herbs, and approximately 120 organic fruits and vegetables.

The strategy of abundance extends from the natural to the international as well, thanks to nearly 5,000 specialty food and beverage products from 19 countries and regions, among them Africa, India, Poland, England, and Asia. ★

## Calendar of Events

### APRIL

**24-26: European Seafood Exposition\***  
Brussels, Belgium  
Parcs des Expositions  
[www.euroseafood.com](http://www.euroseafood.com)

**24-27: Seoul Food & Hotel 2007\***  
Seoul, Korea  
KINTEX (Korea International Exhibition Center) Hall 2, 3  
[www.seoulfood.or.kr](http://www.seoulfood.or.kr)

### MAY

**6-8: Food Marketing Institute Show plus MARKETECHNICS\***  
Chicago, Illinois  
McCormick Place  
[www.fmishow.org](http://www.fmishow.org)

**10-12: SIAL China\***  
Shanghai, China  
Shanghai New International Expo Centre  
[www.sialchina.com](http://www.sialchina.com)

**13-16: HOFEX 2007\***  
Hong Kong  
Hong Kong Convention & Exhibition Centre  
[www.hofex.com](http://www.hofex.com)

**19-22: National Restaurant Association Restaurant Hotel-Motel Show\***  
Chicago, Illinois  
McCormick Place  
<http://www.restaurant.org/show/>

**23-27: Thaifex - World of Food Asia\***  
Bangkok, Thailand  
IMPACT  
[www.worldofthailand.com](http://www.worldofthailand.com)

**30-June 1: IFIA (International Food Ingredients & Additives) Japan\***  
Tokyo Big Sight, West Hall 1 & 2  
Tokyo, Japan  
[www.ifiajapan.com](http://www.ifiajapan.com)

\* Food Export Association of the Midwest and Food Export USA-Northeast will be at this show.

# NEW PRODUCTS

## Healthy ingredients

Frankfort, Michigan-based Graceland Fruit, Inc. offers high-quality fruit and vegetable ingredients that appeal to today's health-conscious, customers. The company's line includes Infused Dried Fruits, Infused Dried Vegetables, Soft-N-Frozen Fruits, and Fridg-N-Fresh Vegetables. Infused Dried Fruits are moist, preservative-free, shelf-stable ingredients that manufacturers can use to add natural sweetness and color to their products. Infused Dried Vegetables are also shelf-stable for one year, and they rehydrate into plump ingredients when cooked in water or juices. A proprietary process is used to create Soft-N-Frozen Fruits, frozen fruit pieces with a natural color and taste. Finally, Fridg-N-Fresh Vegetables feature a 90-day refrigerator shelf life, and retain the appeal of fresh veggies. For more information visit [www.gracelandfruit.com](http://www.gracelandfruit.com), or contact Suzi Mills at (231) 352-7181 or [smills@gracelandfruit.com](mailto:smills@gracelandfruit.com).



## A true classic



Laird's AppleJack—a premium Apple Brandy Blend with 35% Apple Brandy and 65% neutral spirits—has been recognized as the oldest native distilled spirit in the United States. This beverage, known as “an American classic” because of its rich history and distinctive taste, possesses a hint of apple flavor and aroma, and gives a unique smoothness and deep flavor. It also has excellent mixability, imparting a delightful flavor to traditional cocktails, according to Laird & Company, based in Scobeyville, New Jersey. Laird's AppleJack comes in six sizes—1.75 liters, 1 liter, 750 milliliters, 700 milliliters, 375 milliliters, and 200 milliliters. For more information visit [www.lairdandcompany.com](http://www.lairdandcompany.com), or contact Thomas Alberico at (773) 542-0312 or [sales@lairdandcompany.com](mailto:sales@lairdandcompany.com).

## Special sauces

VT Made Richard's Sauces came into being when one St. Albans, Vermont man set out to create a super-hearty, zesty barbecue sauce. Today the company has a complete line of award-winning sauces, yet its recipes are still a family secret. Richard's Barbecue Sauces come in Mild, Hot, and Hottest flavors. They can be used year-round for cooking, marinating, or as a condiment. Richard's Chicken and Game Sauces, meanwhile, are used as tenderizers to lock in natural juices while enhancing various meats' flavor. All the sauces boast no fat, no cholesterol, and all-natural ingredients. Learn more by visiting [www.vtmadebbqu.com](http://www.vtmadebbqu.com), or contact Steve or Martha Rocheleau at (802) 524-3196 or [sauce@vtmadebbqu.com](mailto:sauce@vtmadebbqu.com).



## Cat cuisine

Consumers can help prolong their pets' health, thanks to the innovative products produced by Mississippi-based OmniPro. OmniPro has formulated special blends for adult cats, kittens, and overweight cats. OmniPro Adult Cat Formula meets the needs of adult cats with increased nutritional demands, including pregnant and nursing mothers. It features optimum protein, fat, taurine, and other key nutrients, plus a correct ratio of omega fatty acids, controlled magnesium levels, and pH balance. OmniPro Kitten Formula is for kittens from weaning to 12 months. The product promotes healthy development of muscles, bones, and teeth, while providing energy. For overweight cats, OmniPro has introduced OmniPro Feline Lite Formula, which provides the right combination of nutrients with lower calories and fat to help cats lose weight. Find out more by visiting [www.omniropet.net](http://www.omniropet.net), or contact Leigh Kirtley at (601) 605-1771 or [leigh@omniropet.net](mailto:leigh@omniropet.net).



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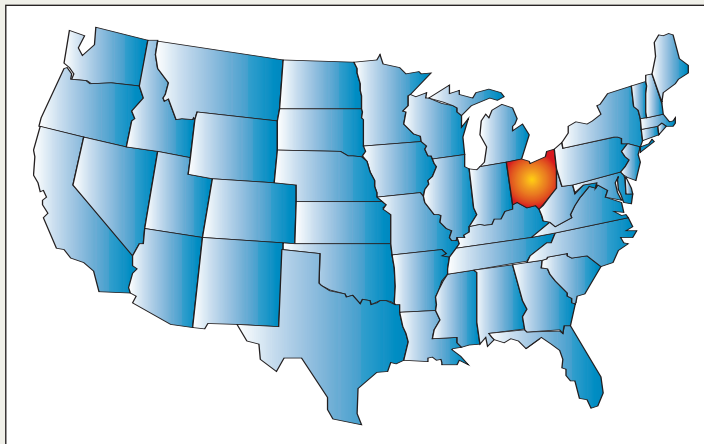
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## STATE SPOTLIGHT: Ohio



✓ Food and agriculture comprise a \$73 billion industry in Ohio. Exports are an important ingredient in the state's economic success.

✓ Field crops provide most of the state's agriculture income. Ohio is among the leading producers of both corn and soybeans. Farming is rated as one of the top eight respected occupations in the state.

✓ Ohio has more than 1,000 food processing plants throughout the state. Many of these companies are home-based processors of fresh meats, jellies, and other specialty foods.

✓ OHIO PROUD is the Ohio Department of Agriculture's signature marketing program, which aids consumers in easily identifying Ohio raised, grown, and processed prod-

ucts—benefiting the state's farmers and food processors. There are approximately 1,200 OHIO PROUD products licensed from the program's 193 partners.

**TOP AGRICULTURAL EXPORTS:**

**WOOD**  
Total value: \$244.27 million

**OIL SEEDS**  
Total value: \$184.5 million

**ANIMAL FEEDS**  
Total value: \$129.3 million

**CEREAL & MILK PRODUCTS**  
Total value: \$94.26 million

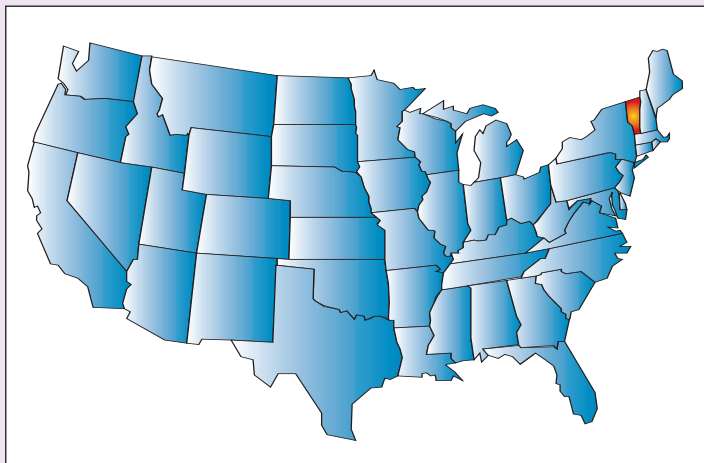
**CEREALS**  
Total value: \$75.2 million

**PRESERVED FRUITS & VEGS**  
Total value: \$58.9 million

**PREPARED FOODS**  
Total value: \$45.6 million

**FATS & OILS**  
Total value: \$40.56 million

## STATE SPOTLIGHT: Vermont



✓ Vermont is perhaps best known for its mouth-watering cheeses and other dairy products. There are approximately 435 dairy farms and 140,000 dairy cows in the state.

✓ Vermont produces more than 2.6 billion pounds of milk annually, which is used for both milk and cheese. Its annual cheese production is in excess of 100 million pounds.

✓ Vermont is first in the nation in the production of maple syrup (495,000 gallons in 2002), accounting for just over 37% of the nation's entire output.

✓ In 2002 agriculture was worth \$556 million to the Vermont economy in total cash receipts. Of that total, sales from milk accounted for approximately \$400 million.

✓ Vermont is first in the New England region in the production of beef. The state also produces a variety of fruits, vegetables, and berries, which account for nearly \$23 million annually.

**TOP AGRICULTURAL EXPORTS:**

**WOOD**  
Total value: \$57.9 million

**DAIRY PRODUCTS**  
Total value: \$13.99 million

**PREPARED FOODS**  
Total value: \$7.18 million

**SWEETENERS**  
Total value: \$6.9 million

**CEREAL & MILK PRODUCTS**  
Total value: \$5.05 million

**LIVE ANIMALS**  
Total value: \$2.47 million

**SEAFOOD**  
Total value: \$2.0 million

# NEWS BRIEFS

In what's being billed as the "biggest Fair Trade move in the world," London-based Sainsbury's has said it will be the first UK retailer to convert its entire banana range to 100% Fair Trade. The retail price of bananas will remain unchanged after the conversion. Sainsbury's, which sells a thousand bananas per minute, estimates that its share of the entire Fair Trade market will now be larger than all the other major supermarkets in the UK combined. The conversion to 100% Fair Trade bananas will create a "social premium" of around \$7.8 million in 2007, which will be returned to the growers and their communities, the company said.

Fast food giant McDonald's Corp. is making its mark in sustainable products as well. The company has announced it will sell only eco-friendly coffee at its 1,200 restaurants in the **United Kingdom and Ireland**. The Kenco coffee, sold by Kraft Foods Inc., is certified by the conservation organization Rainforest Alliance—a distinction that

comes from products grown on farms that meet the alliance's standards for environmental and worker protection. Wal-Mart and Sam's Club are among the **U.S.** businesses that carry coffee approved by the Rainforest Alliance.

Driven by rising disposable incomes and a general desire for

more Western lifestyles, **Russian** consumers are not only eating out more often but demanding greater choice in foodservice, according to a new report by Planet Retail. The London-based research firm predicts that foodservice sales in Russia will increase by an average 14.6% annually to \$37 billion in 2010. So far, the majority of international and Russian foodservice

players have limited their operations to the urban areas of Moscow and St. Petersburg. However, recent research shows that chains are expanding out of the city center into the suburbs. The most popular chains are those which serve traditional Russian fare, as well as Italian- and Asian-inspired food. Sushi restaurants are increasingly becoming popular. ★

## Food trends to watch in 2007

New approaches to old problems appear to be in store for 2007, as New York-based market researcher Datamonitor predicts the top trends in consumer packaged goods for the new year. Here are a few:

**CALORIE-BURNING BEVERAGES**—Several new breakthrough beverages are creating an exciting new niche: calorie-burning drinks. Coca-Cola and Nestle (through its Nestea brand) have paired up to launch Enviga Energy Drink in the U.S. and Europe. Enviga burns calories with green tea extracts with EGCG, an ingredient that may gain steam in 2007.

**SATIETY-ENHANCING FOODS & DRINKS**—Satiety is a little word that could have a big impact on the food and beverage marketplace. The word literally means the "feeling of fullness" and disappearance of appetite experienced after consuming a large meal. In Europe, Danone Shape Lasting Satisfaction

Yogurt features a unique formulation of fiber and protein to help one feel satisfied, longer.

**MAKE IT MOBILE**—Apple's iPod has revolutionized the music industry by making music more portable than ever. Packaged goods makers are also jumping on the mobility bandwagon by tweaking their products to make them better suited for on-the-go lifestyles.

**KIDS' FOOD GETS HEALTHY**—Marketing foods to kids is getting more complicated. Not only are schools dumping so-called "junk" foods, but marketers like Disney are establishing their own healthy food guidelines. Just to show healthy doesn't have to mean boring or tasteless, new Fizzy Fruit Sparkling Fresh Grapes in the U.S. add carbonation to grapes for a new snacking taste sensation for kids.

**IMMUNITY-BOOSTING FOODS & DRINKS**—There is growing realization that some foods and beverages can give the body a healthy "shot" to the immune system to guard against sickness.

Probiotic foods that help regulate digestive tract health, including cultured dairy drinks and yogurts, are leading the way.

**"FOR ONE" FOOD & DRINK OPTIONS**—One may be the loneliest number when it comes to dining, but that isn't stopping packaged food and beverage makers from reaching out to single-person households. This long-ignored market gained attention in 2006 from launches like Baker's Inn Short Loaf Sliced Bakery Bread (USA) and Sainsbury's Taste the Difference Half a Sandwich (UK). ★

## MISSION STATEMENT

The U.S. Foodlink Web site, newsletter, and e-mail bulletin are all brought to you by the Food Export Association of the Midwest USA and Food Export USA – Northeast, two state regional trade groups located in the U.S. that promote exports of U.S. food and agriculture. Through a partnership with Progressive Grocer/VNU, U.S. Foodlink was created to provide readers credible data and information in an easy-to-read format.

Persons in the U.S.: Food Export Association of the Midwest USA and Food Export USA – Northeast prohibit discrimination in employment and services. Persons with disabilities who require alternate means for communication of program information, or to request our full nondiscriminatory policy, please contact us.

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